US 20020026359A1

(19) United States

(12) Patent Application Publication (10) Pub. No.: US 2002/0026359 A1

Long et al. (43) Pub. Date: Feb. 28, 2002

(54) TARGETED ADVERTISING METHOD AND SYSTEM

(76) Inventors: **Kenneth W. Long**, Monroe, NC (US); **Michael B. Robinson**, Churchville, MD (US); **Robert N. Glezen**, Duluth, GA (US); **Christopher M. Jenkins**, Woodstock, GA (US); **Douglas J. Mazur**, Lilburn, GA (US)

Correspondence Address:
Kenneth E. Krosin
FOLEY & LARDNER
Washington Harbour
3000 K Street, N.W., Suite 500
Washington, DC 20007-5109 (US)

(21) Appl. No.: **09/789,965**

(22) Filed: **Feb. 22, 2001**

Related U.S. Application Data

(63) Non-provisional of provisional application No. 60/183,921, filed on Feb. 22, 2000.

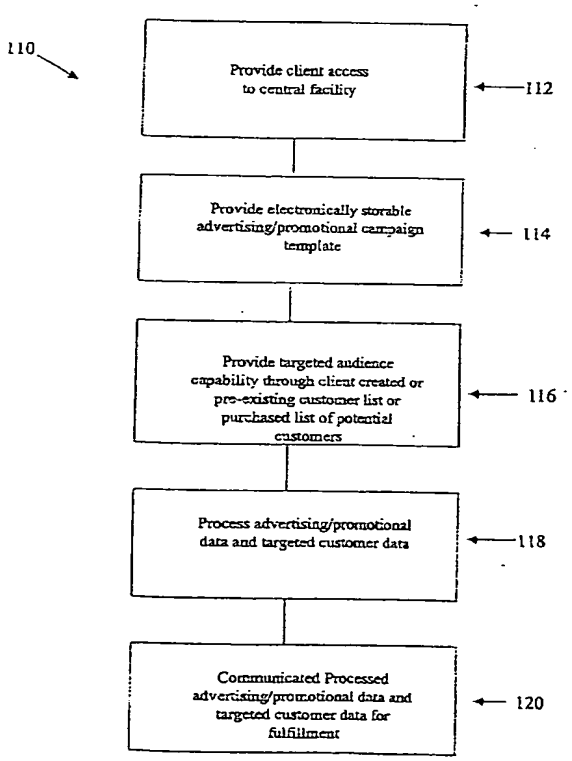
Publication Classification

(51) **Int. Cl.**[7] **G06F 17/60**

(52) **U.S. Cl.** **705/14**

(57) **ABSTRACT**

A method of targeted advertising includes generating a targeted advertising and/or promotional campaign material corresponding to a client's selections, fulfilling the targeted advertising and/or promotional campaign material, and providing a response tracking analysis to the client. The targeted advertising and/or promotional campaign material includes a response tracking capability. Access for the client to contact a central facility having public and/or private client databases with list management capabilities can be provided on-line via a client web site. The client can choose from a selection of templates to design of the targeted advertising and/or promotional campaign material. Also, the client can choose from a selection of intended recipients by using and/or modifying a new or pre-existing customer list. The targeted advertising and/or promotional campaign material can be manufactured and distributed to the intended recipients. Preferably, the advertising and/or promotional campaign material includes a coupon having a machine readable mark, symbol, or barcode that incorporates information relating to the client, the customer, and the advertising and/or promotional campaign. The scanned coupon can be communicated back to the central facility and the client can be notified by the central facility as to the response characteristics of the advertising and/or promotional campaign. A closed-loop system is also provided that can implement the above targeted advertising method.



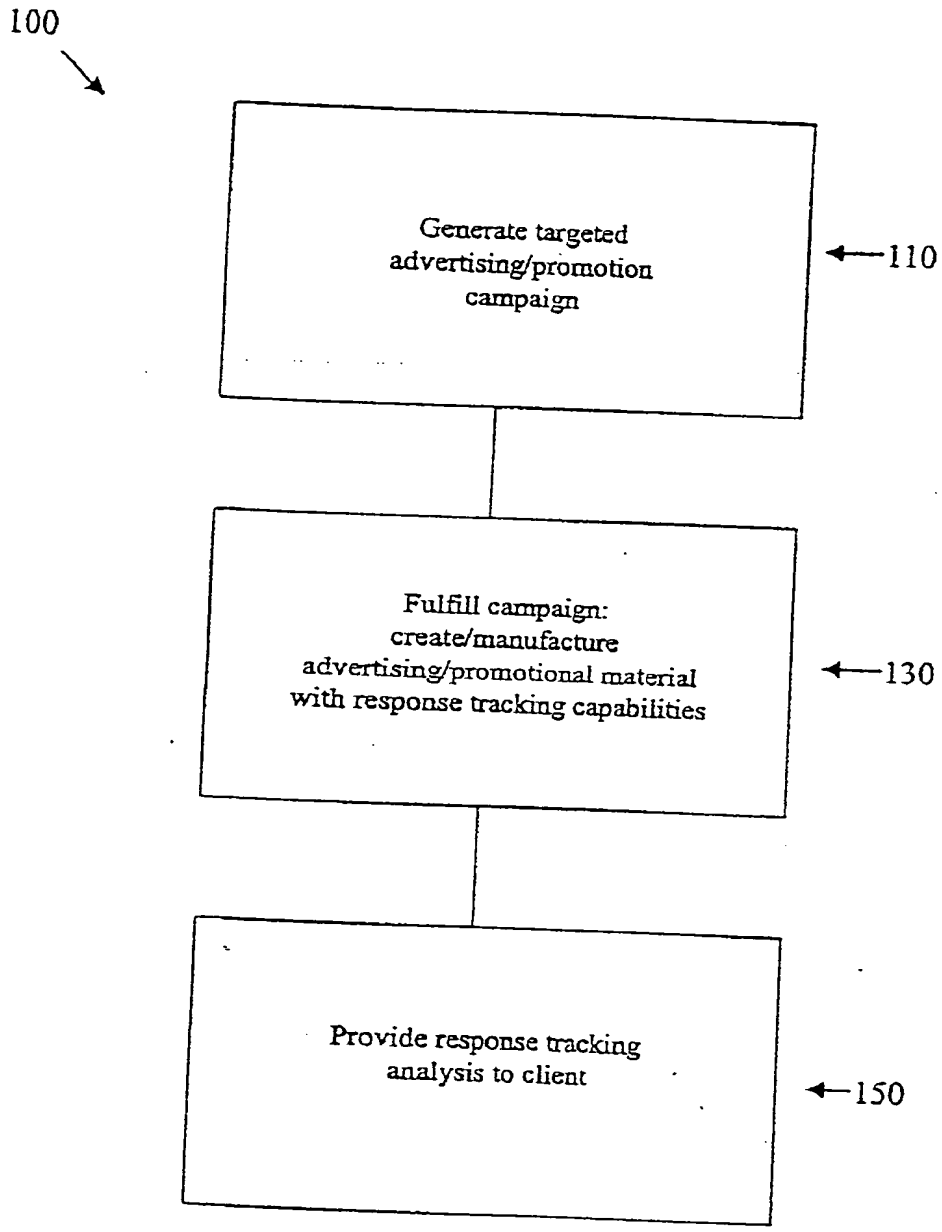

100
Generate targeted advertising/promotion campaign
110
Fulfill campaign: create/manufacture advertising/promotional material with response tracking capabilities
130
Provide response tracking analysis to client
150

Fig. 1

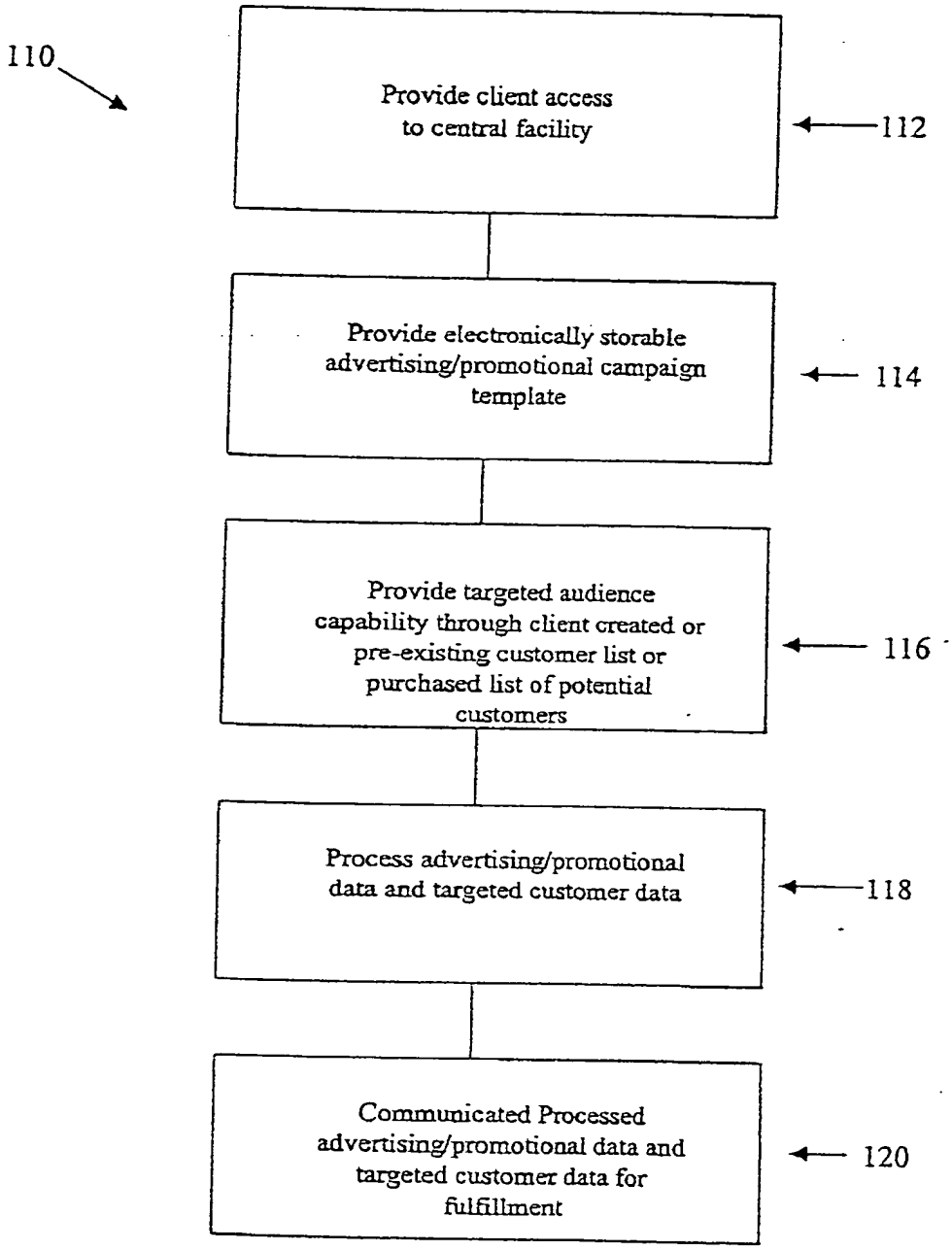

110
Provide client access to central facility
112
Provide electronically storable advertising/promotional campaign template
114
Provide targeted audience capability through client created or pre-existing customer list or purchased list of potential customers
116
Process advertising/promotional data and targeted customer data
118
Communicated Processed advertising/promotional data and targeted customer data for fulfillment
120

Fig. 2

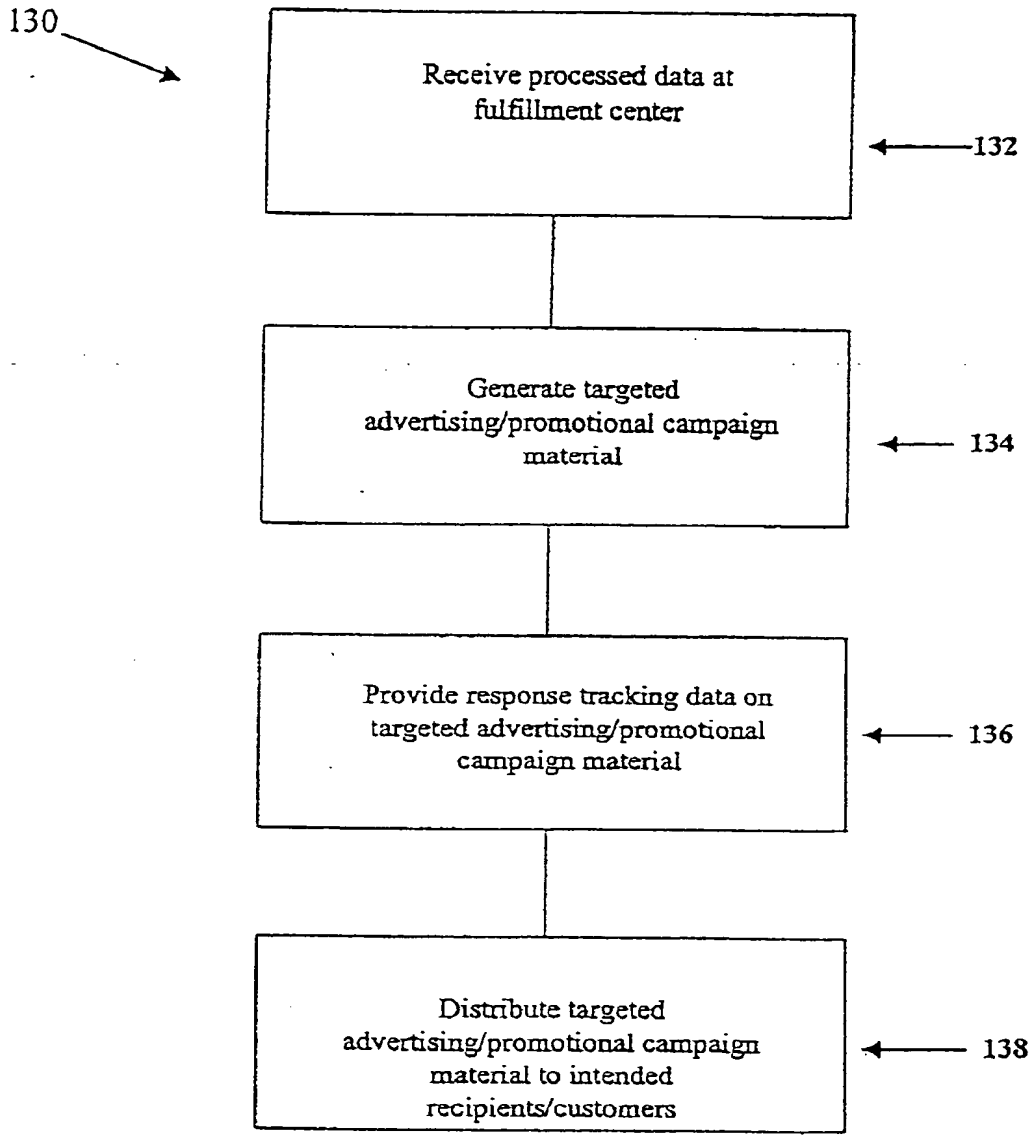

130
Receive processed data at fulfillment center
132
Generate targeted advertising/promotional campaign material
134
Provide response tracking data on targeted advertising/promotional campaign material
136
Distribute targeted advertising/promotional campaign material to intended recipients/customers
138

Fig. 3

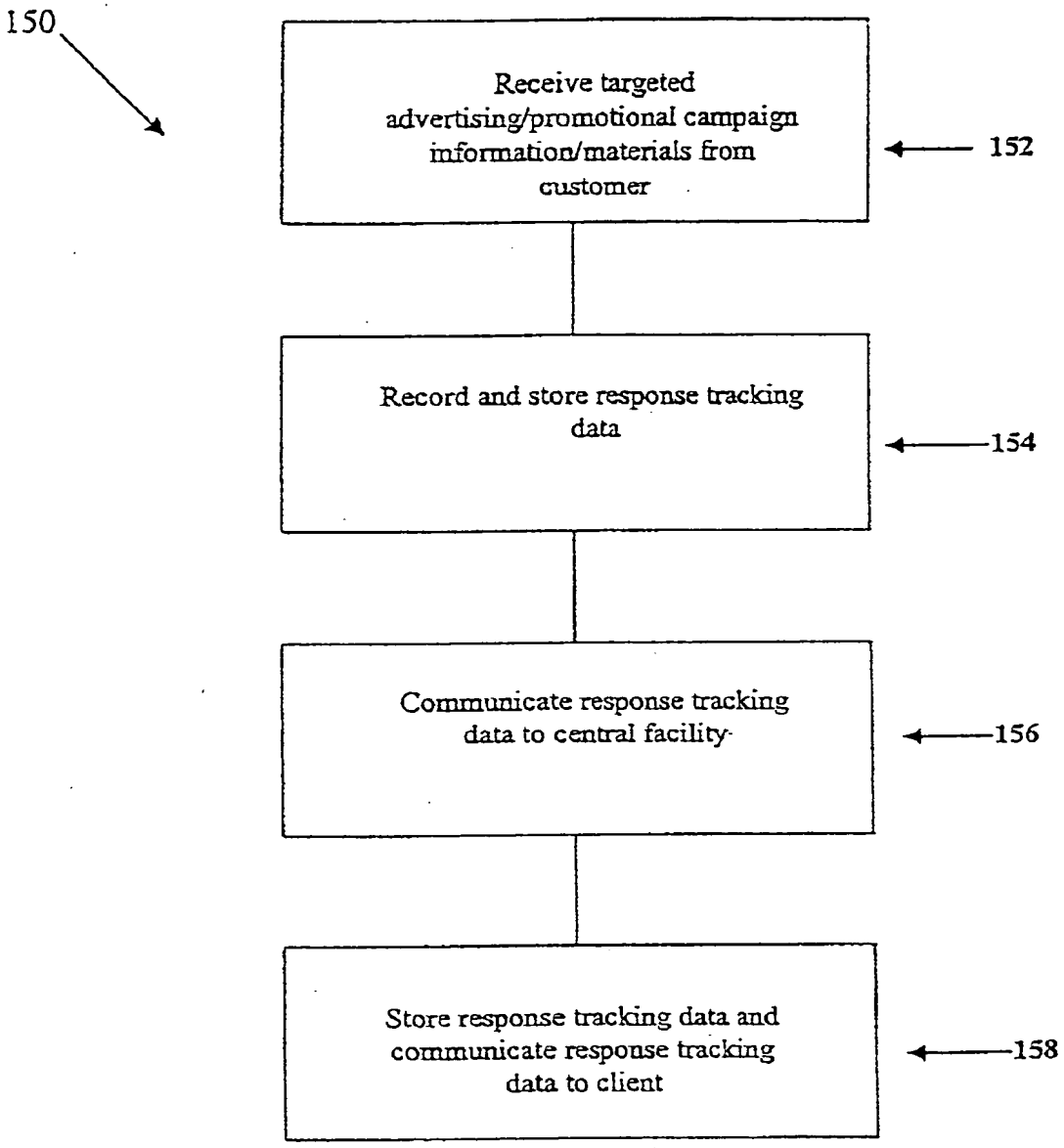

150
Receive targeted advertising/promotional campaign information/materials from customer
152
Record and store response tracking data
154
Communicate response tracking data to central facility
156
Store response tracking data and communicate response tracking data to client
158

Fig. 4

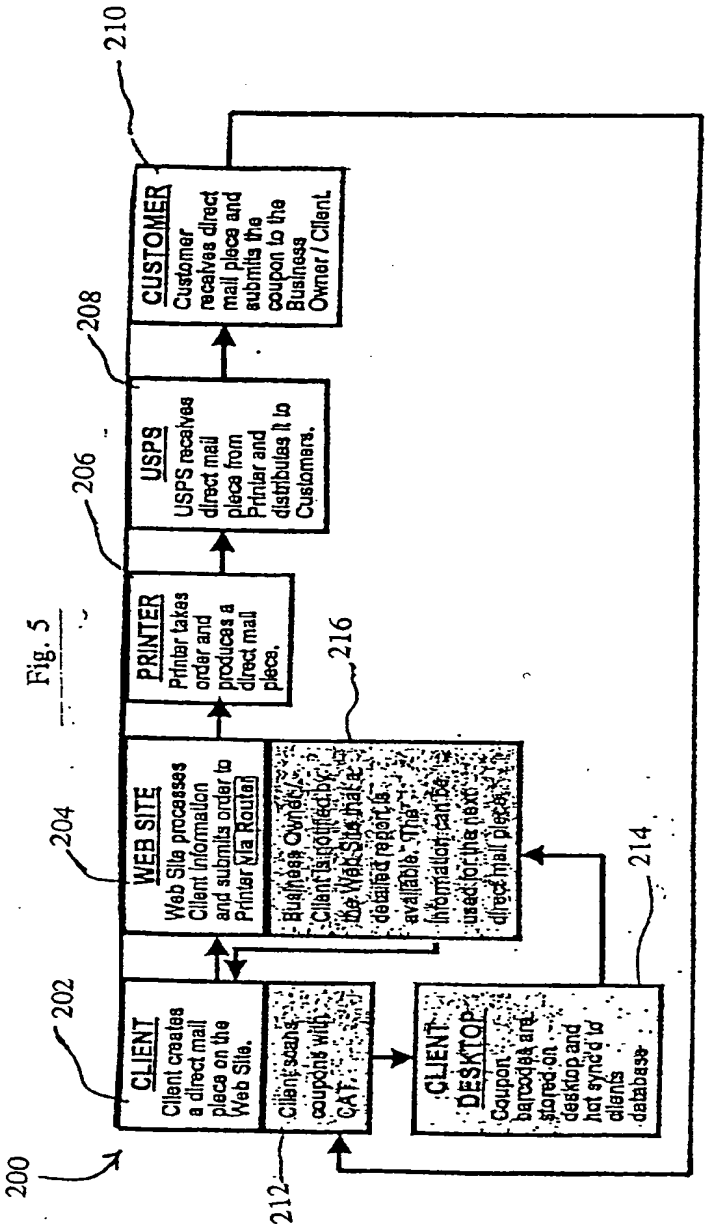

200
202
CLIENT
Client creates a direct mail piece on the Web Site.
Client scans coupons with CAT.
204
WEB SITE
Web Site processes Client information and submits order to Printer via Router
Business Owner is notified by the Web Site that a detailed report is available. The information can be used for the next direct mail piece.
206
PRINTER
Printer takes order and produces a direct mail piece.
208
USPS
USPS receives direct mail piece from Printer and distributes it to Customers.
210
CUSTOMER
Customer receives direct mail piece and submits the coupon to the Business Owner / Client.
212
214
CLIENT DESKTOP
Coupon barcodes are stored on desktop and hot synch'd to clients database
216

Fig. 5

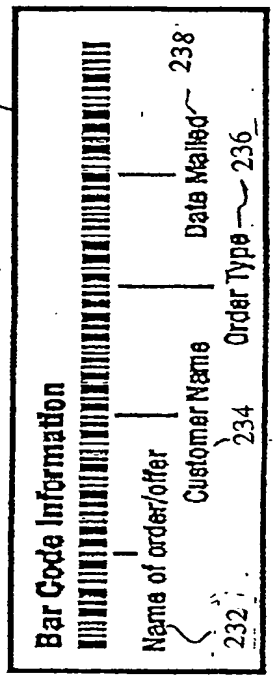

230
Bar Code Information
Name of order/offer
232
Customer Name
234
Order Type
236
Date Mailed
238

Fig. 6

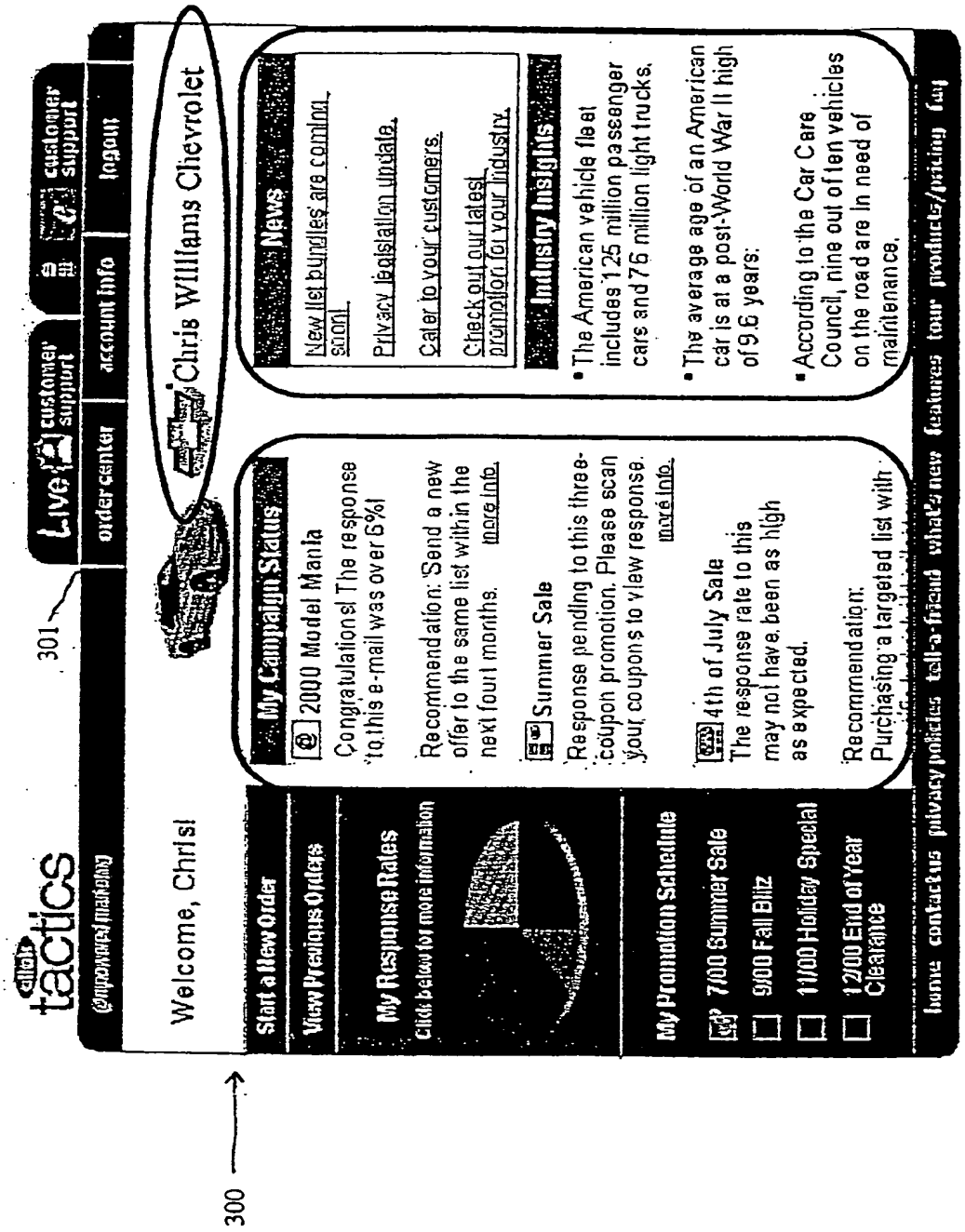

300
301
tactics
Live customer support
order center
account info
logout
Welcome, Chris!
Chris Williams Chevrolet
Start a New Order
View Previous Orders
My Response Rates
Click below for more information
My Promotion Schedule
7/00 Summer Sale
9/00 Fall Blitz
11/00 Holiday Special
12/00 End of Year Clearance
My Campaign Status
2000 Model Mania
Congratulations! The response to this e-mail was over 6%!
Recommendation: Send a new offer to the same list within the next four months. more info.
Summer Sale
Response pending to this three-coupon promotion. Please scan your coupons to view response. more info.
4th of July Sale
The response rate to this may not have been as high as expected.
Recommendation: Purchasing a targeted list with
News
New list bundles are coming soon!
Privacy legislation update.
Cater to your customers.
Check out our latest promotion for your industry.
Industry Insights
The American vehicle fleet includes 125 million passenger cars and 76 million light trucks.
The average age of an American car is at a post-World War II high of 9.6 years.
According to the Car Care Council, nine out of ten vehicles on the road are in need of maintenance.
future contactus privacy policies tell-a-friend what's new features tour products/pricing faq

Fig. 7A

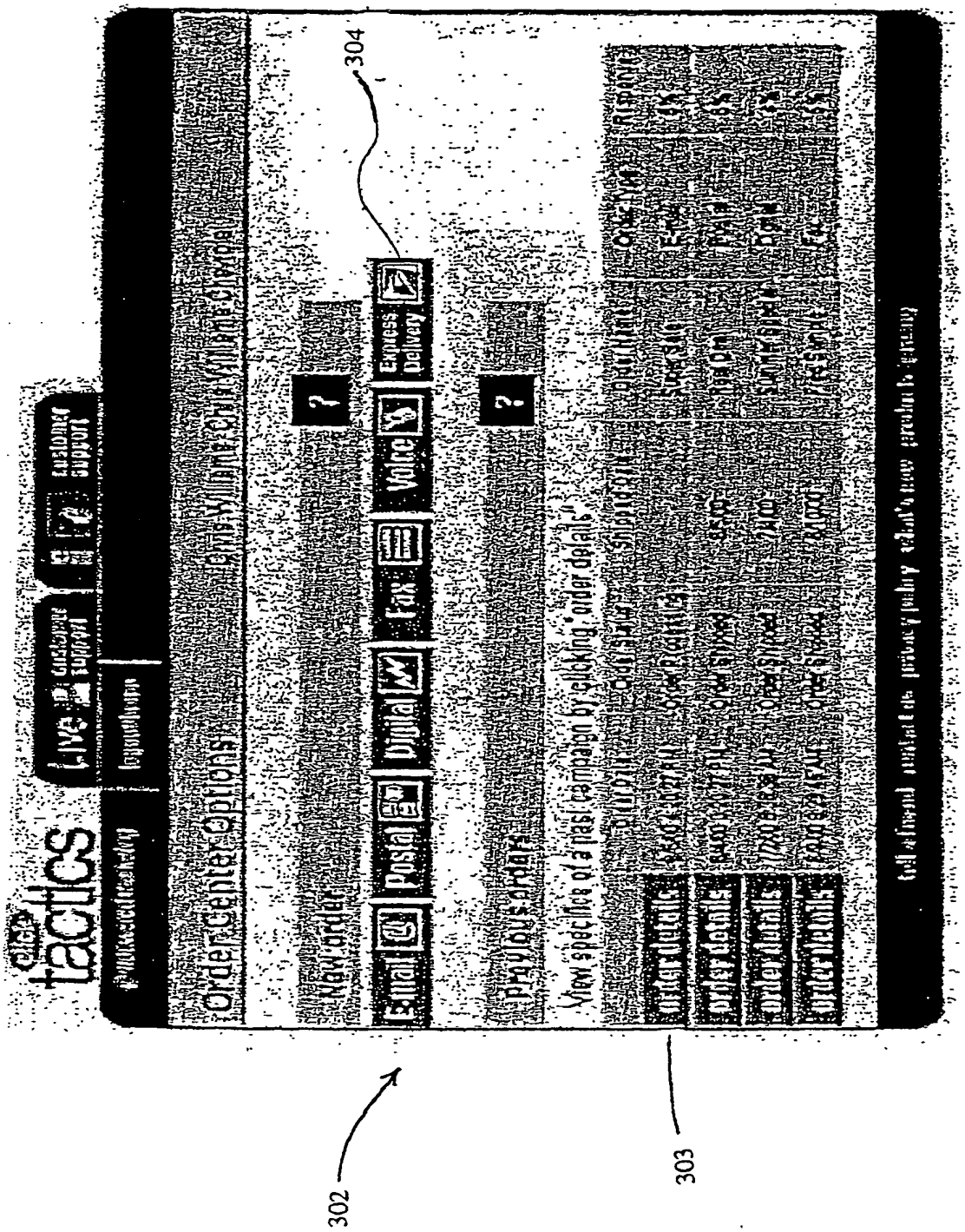


Fig. 7B

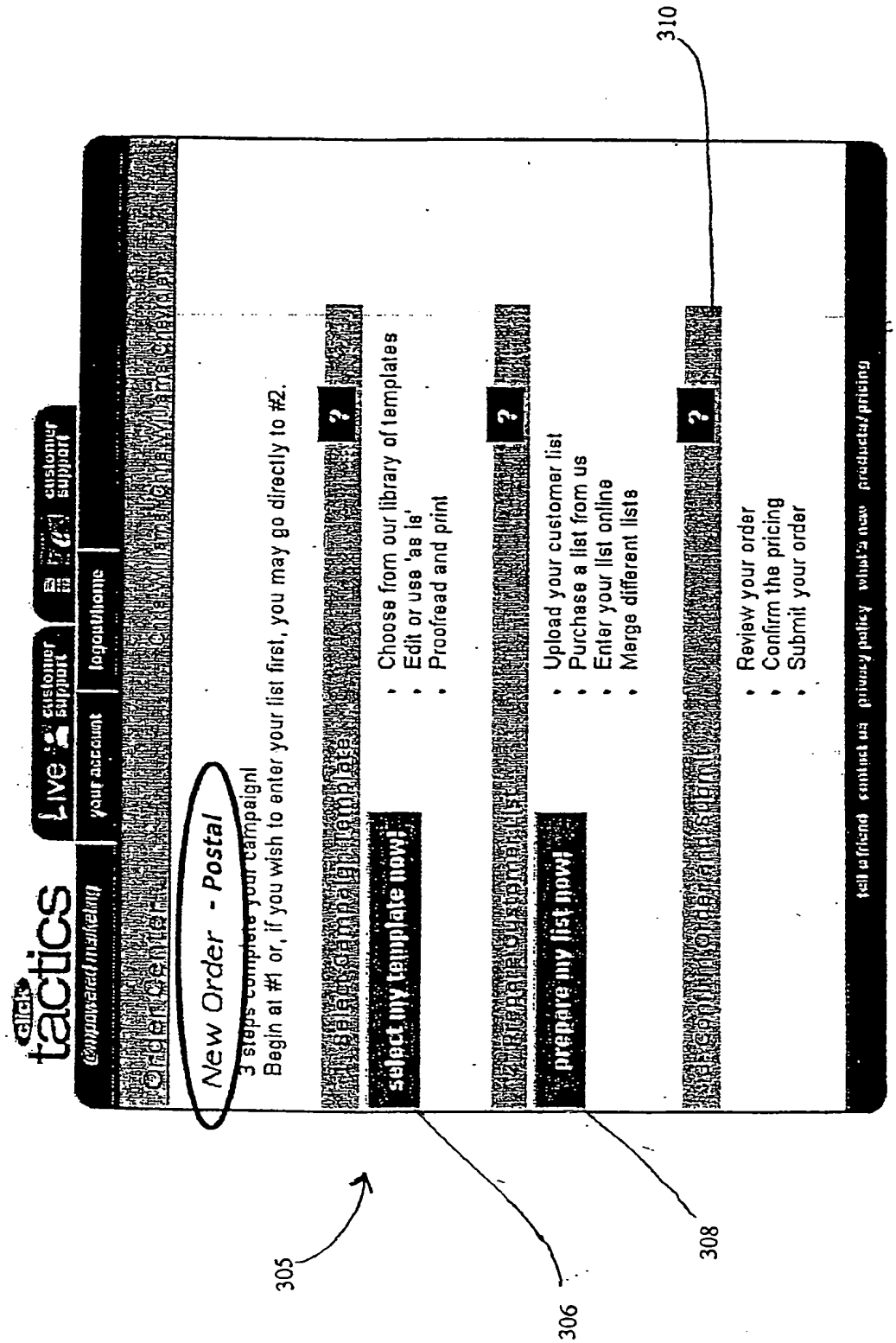

New Order - Postal
3 steps complete your campaign!
Begin at #1 or, if you wish to enter your list first, you may go directly to #2.
select my template now!
Choose from our library of templates
Edit or use 'as is'
Proofread and print
prepare my list now!
Upload your customer list
Purchase a list from us
Enter your list online
Merge different lists
Review your order
Confirm the pricing
Submit your order
305
306
308
310

Fig. 7C

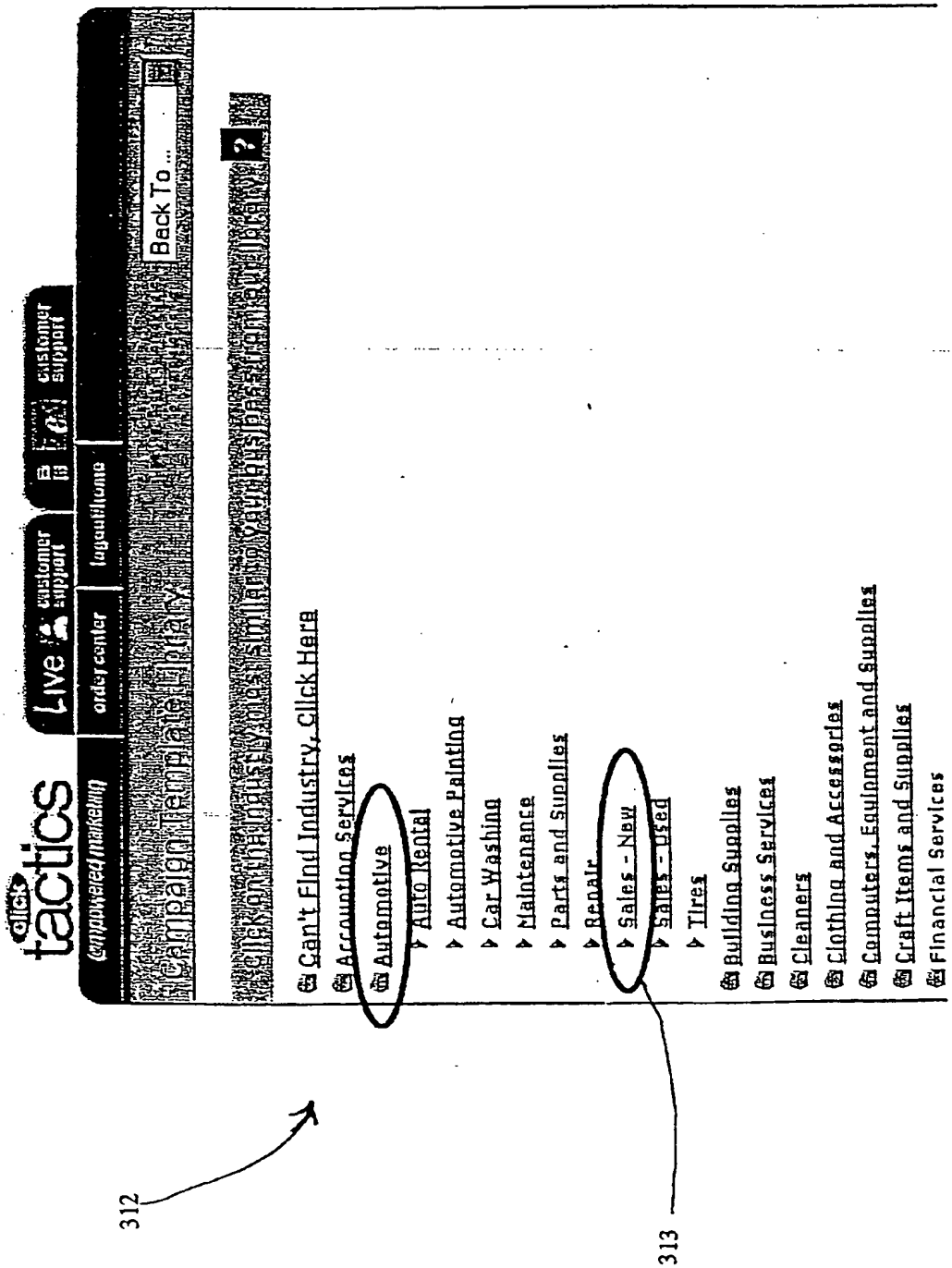

click tactics
Live
customer support
order center
loyaltiforms
Back To...
Can't Find Industry, Click Here
Accounting Services
Automotive
Auto Rental
Automotive Painting
Car Washing
Maintenance
Parts and Supplies
Repair
Sales - New
Sales - Used
Tires
Building Supplies
Business Services
Cleaners
Clothing and Accessories
Computers, Equipment and Supplies
Craft Items and Supplies
Financial Services
312
313

Fig. 8.

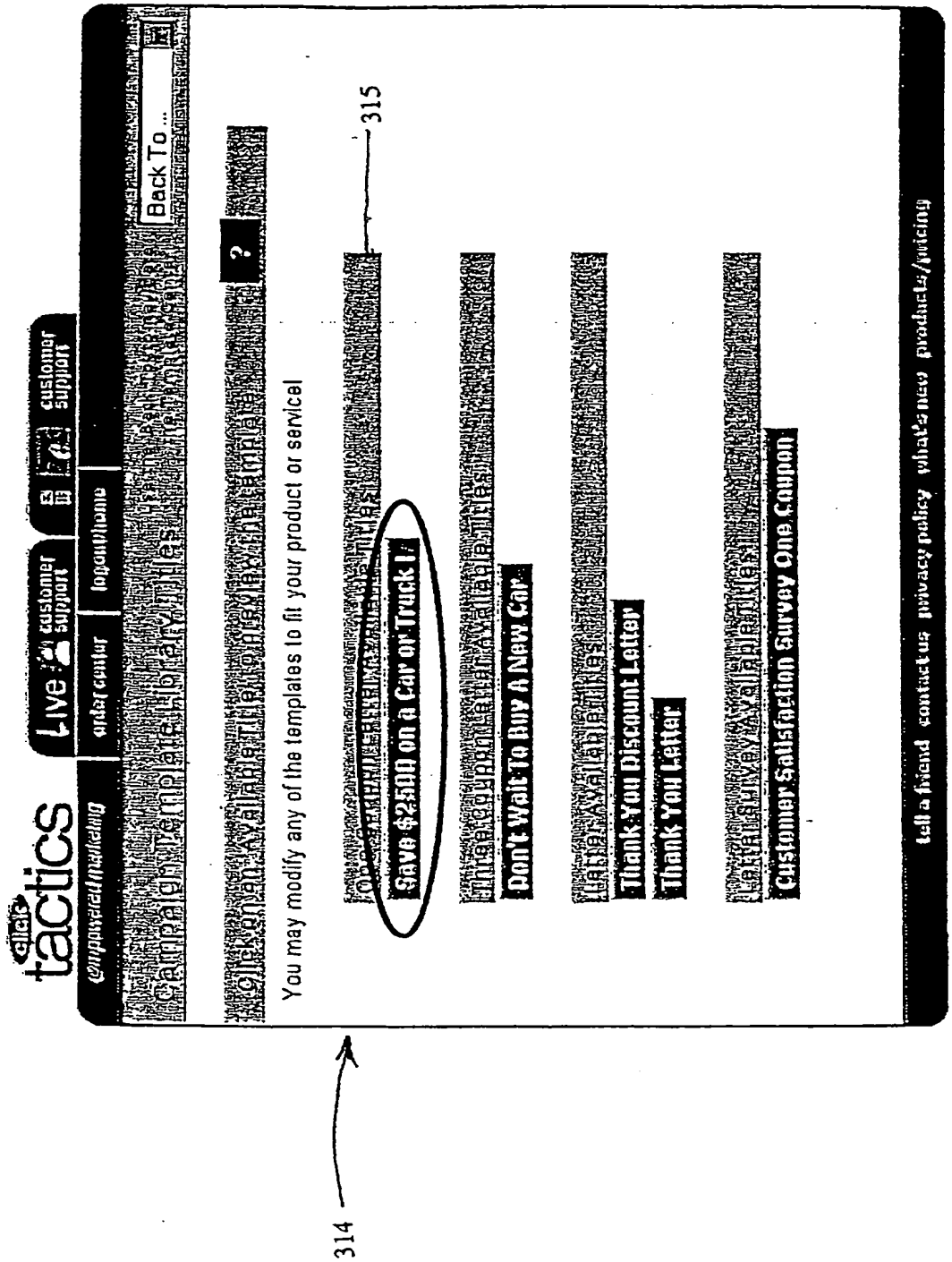

tactics
Live
customer support
order center
logout/home
Back To ...
You may modify any of the templates to fit your product or service!
Save $2500 on a Car or Truck!
Don't Wait To Buy A New Car
Thank You Discount Letter
Thank You Letter
Customer Satisfaction Survey One Coupon
tell a friend
contact us
privacy policy
what's new
products/pricing
314
315

Fig. 9

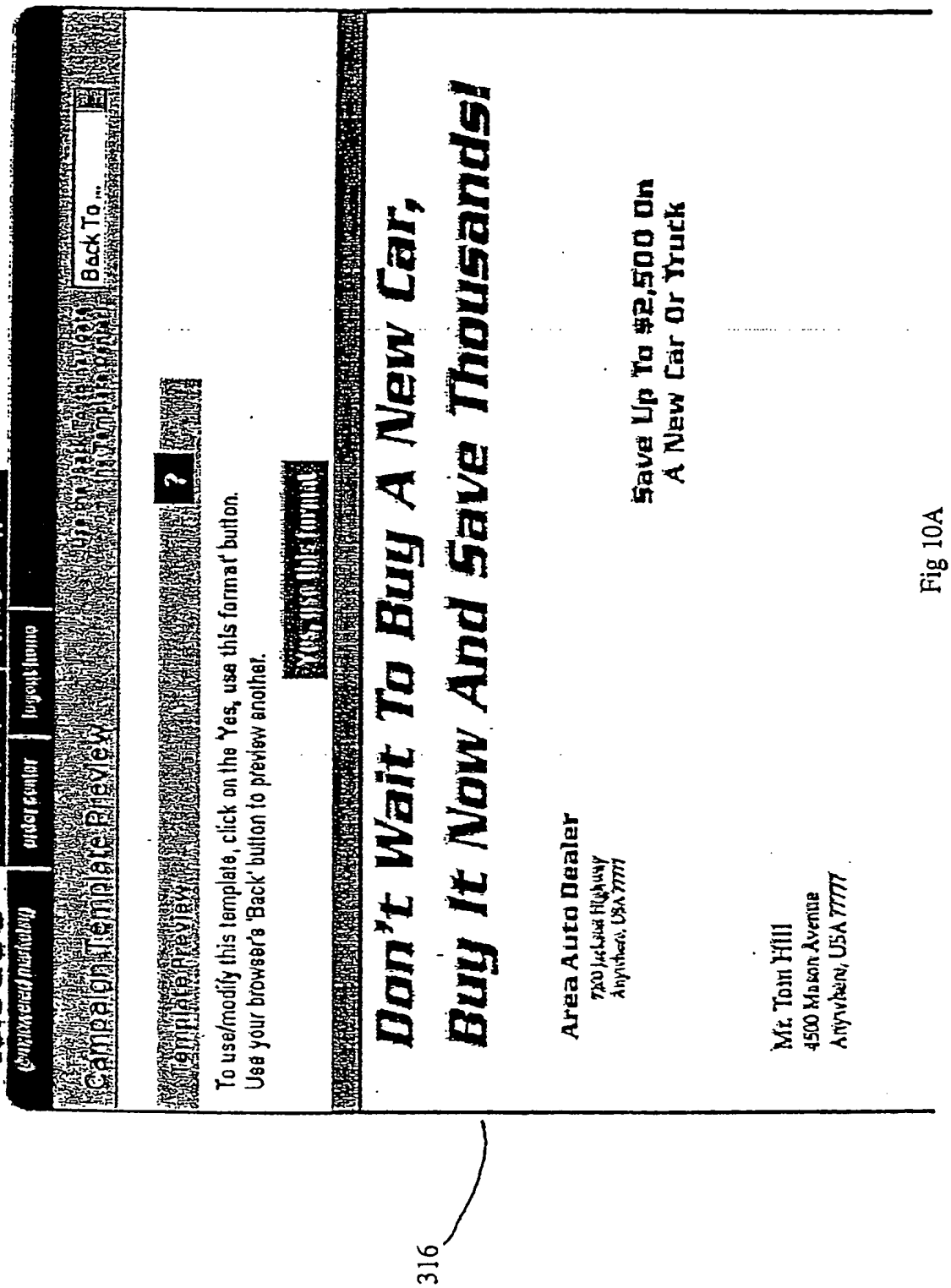

tactics
Live
customer support
customer support
Logout Name
Back To ...
Campaign Template Preview
Template Preview
To use/modify this template, click on the 'Yes, use this format' button.
Use your browser's 'Back' button to preview another.
Yes, use this format
Don't Wait To Buy A New Car,
Buy It Now And Save Thousands!
Area Auto Dealer
Save Up To $2,500 On
A New Car Or Truck
Mr. Tom Hill
4500 Mason Avenue
Anywhere, USA 77777
316

Fig 10A

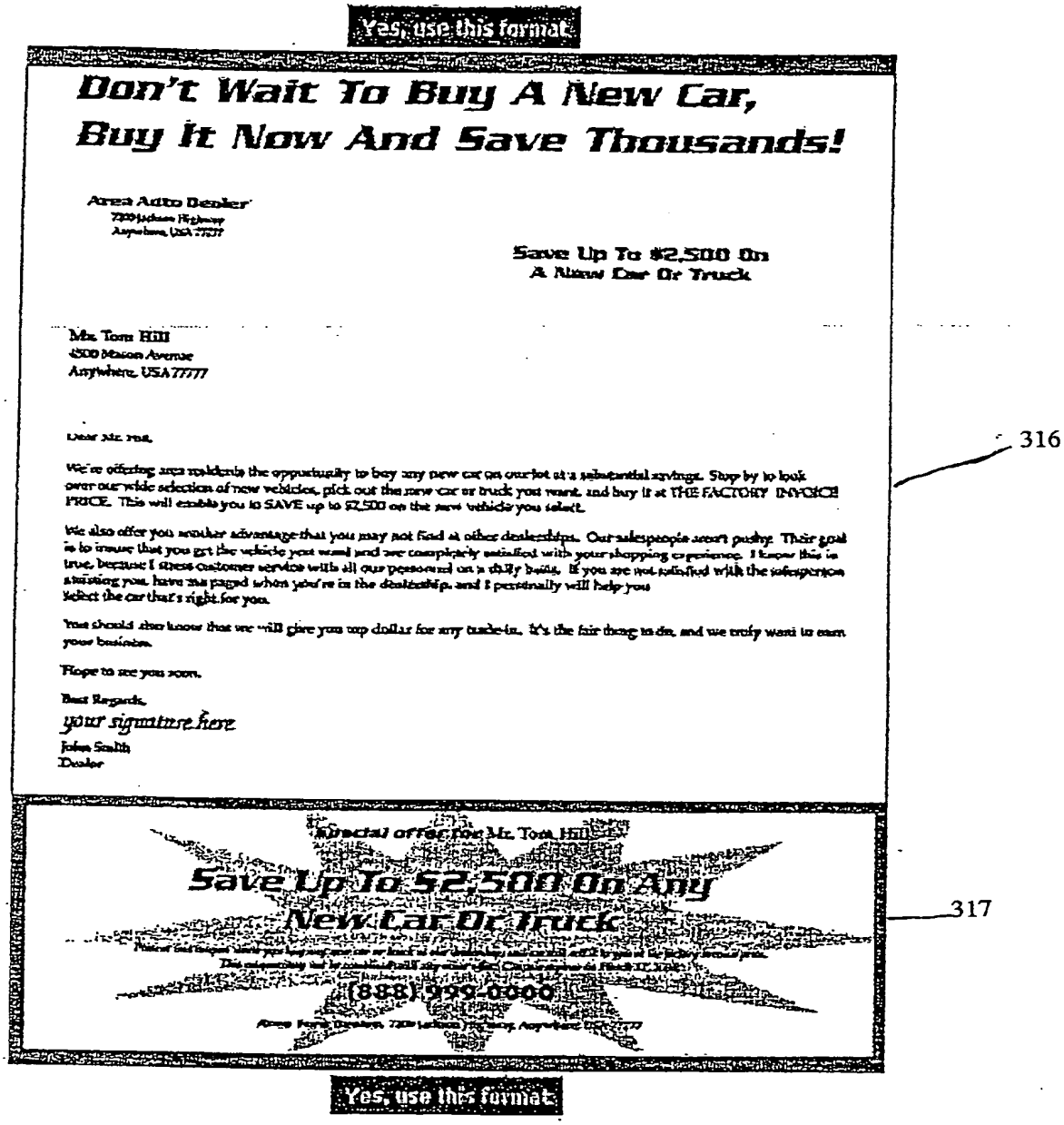
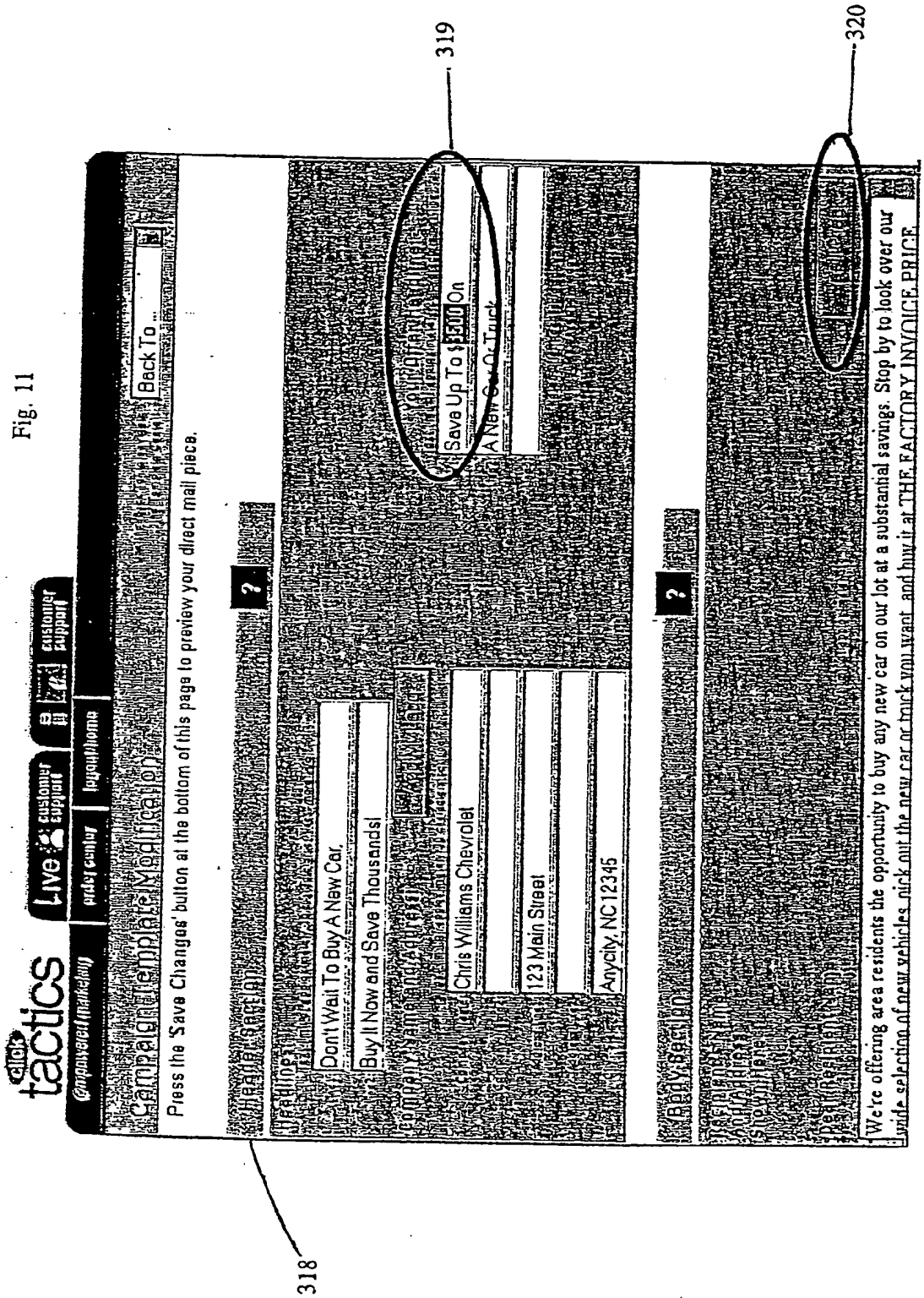
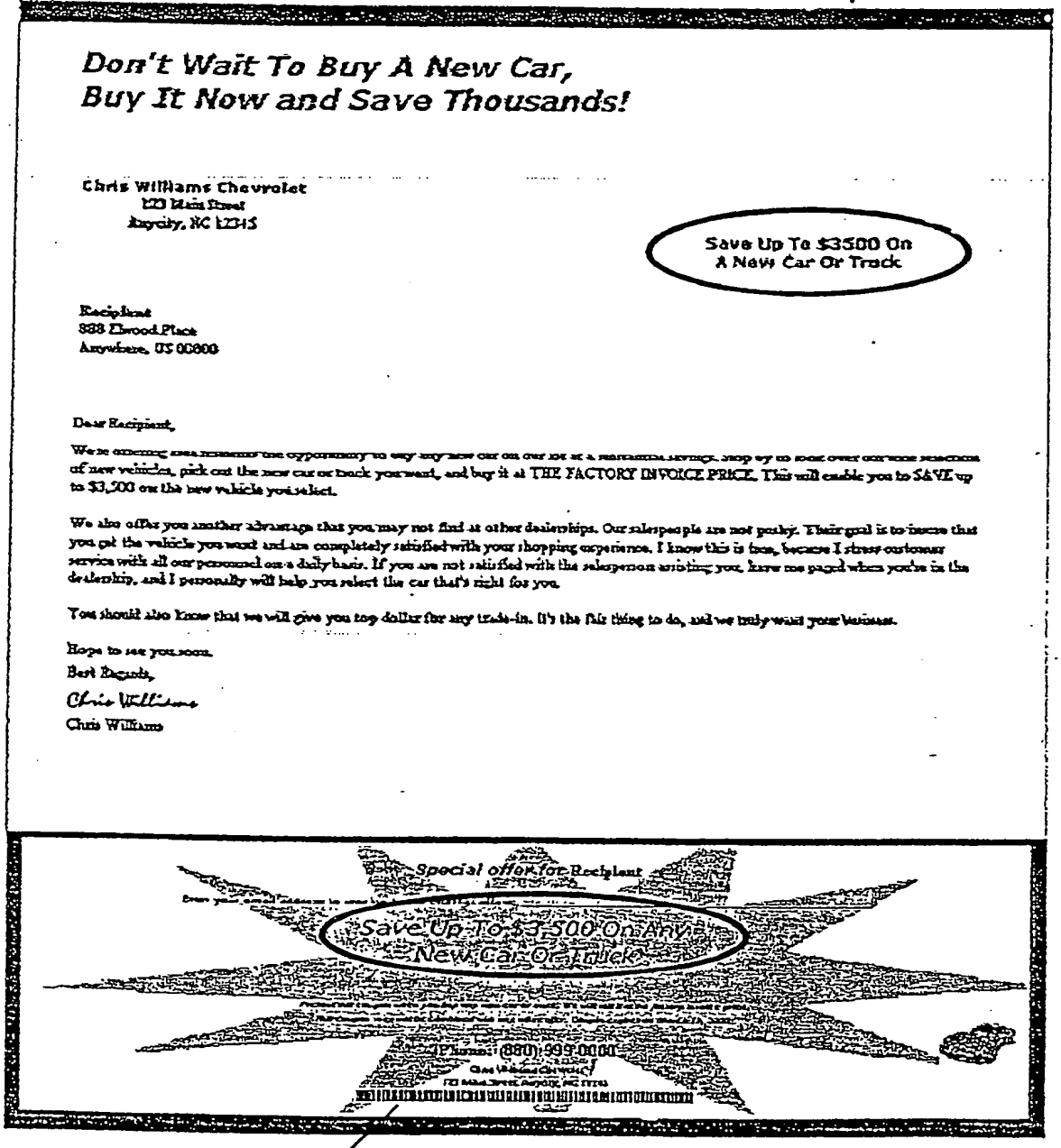

Yes, use this format
Don't Wait To Buy A New Car,
Buy It Now And Save Thousands!
Area Auto Dealer
Save Up To $2,500 On
A New Car Or Truck
Mr. Tom Hill
4500 Mason Avenue
Anywhere, USA 77777
316
Special offer for Mr. Tom Hill
Save Up To $2,500 On Any
New Car Or Truck
(888) 999-0000
317
Yes, use this format

Fig. 10B

Fig. 11


319
320
318
Back To ...
Press the 'Save Changes' button at the bottom of this page to preview your direct mail piece.
Don't Wait To Buy A New Car.
Buy It Now and Save Thousands!
Chris Williams Chevrolet
123 Main Street
Anycity, NC 12345
Save Up To $500 On
We're offering area residents the opportunity to buy any new car on our lot at a substantial savings. Stop by to look over our wide selection of new vehicles, pick out the new car or truck you want, and buy it at THE FACTORY INVOICE PRICE.

322



323

Fig. 12

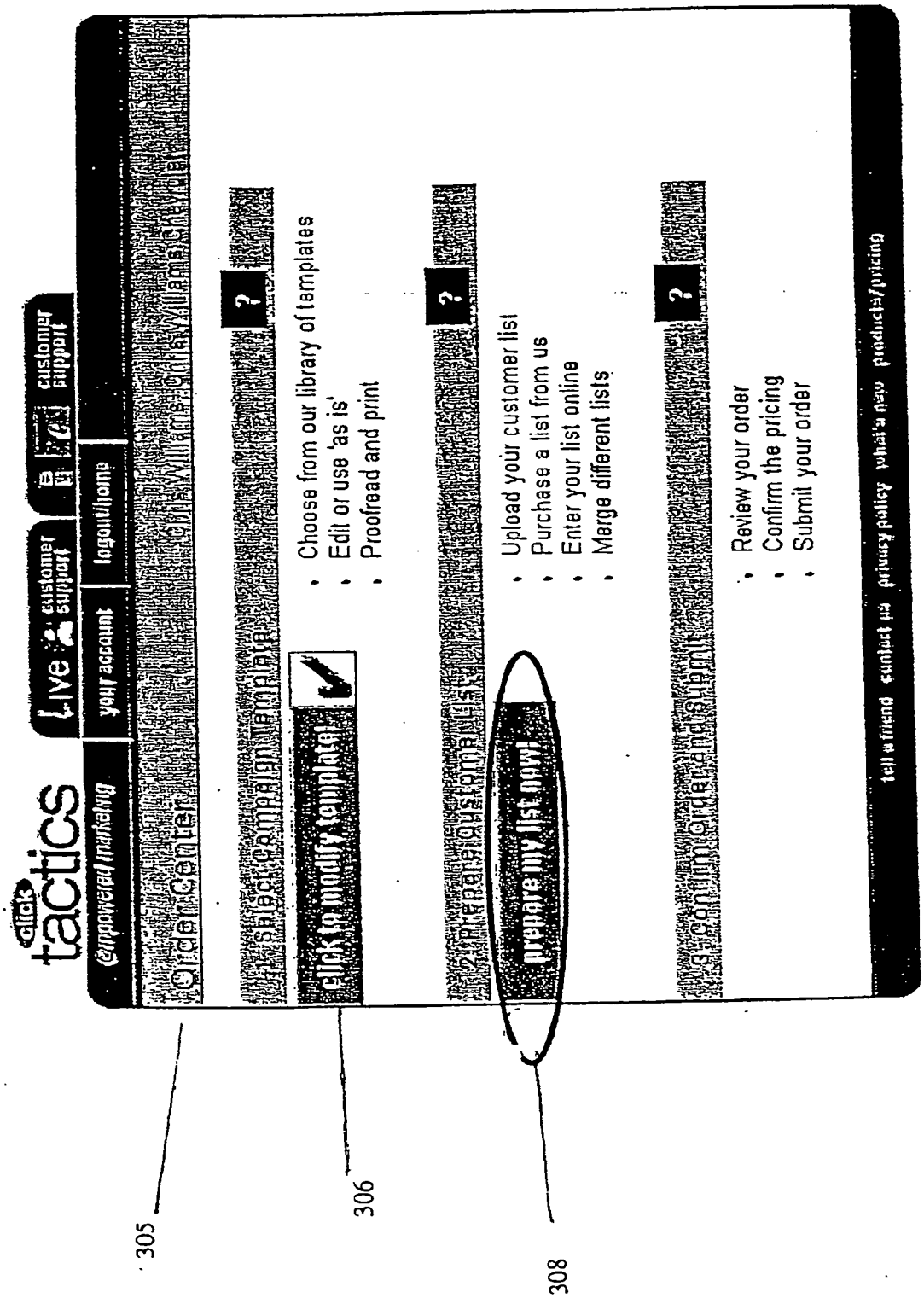
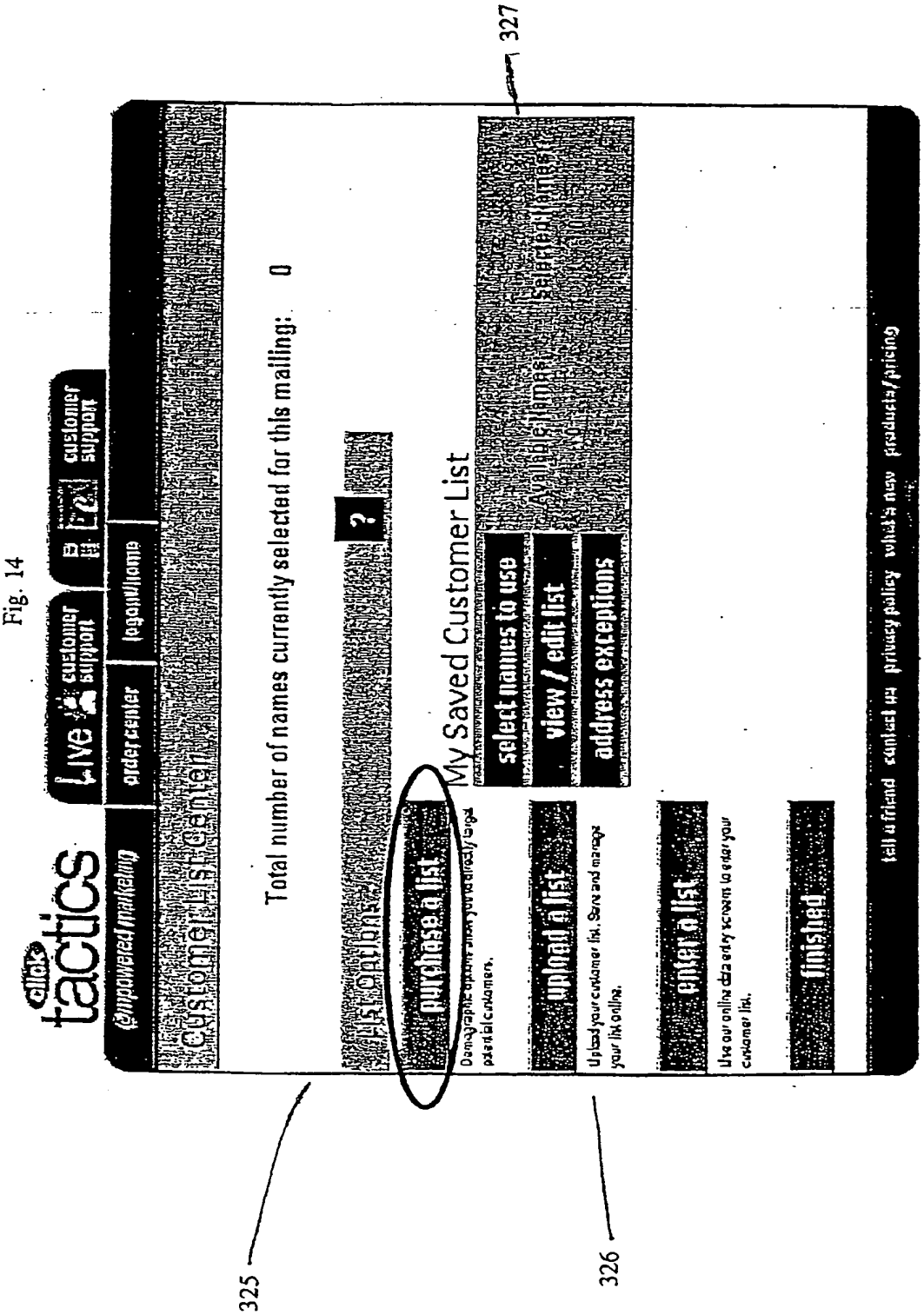

click tactics
Live
customer support
your account
logout/home
empowered marketing
Welcome Carla Williams
Select Campaign Template
Choose from our library of templates
Edit or use 'as is'
Proofread and print
click to modify a template
Prepare Customer List
Upload your customer list
Purchase a list from us
Enter your list online
Merge different lists
prepare my list now!
Confirm Order and Submit
Review your order
Confirm the pricing
Submit your order
tell a friend contact us privacy policy what's new products/pricing
305
306
308

Fig. 13

Fig. 14


327
elektactics
customer support
Live
customer support
@mpowered marketing
order center
login/logout
customer list center
Total number of names currently selected for this mailing: 0
?
My Saved Customer List
select names to use
view / edit list
address exceptions
purchase a list
unload a list
Upload your customer list. Save and manage your list online.
enter a list
Use our online data entry screens to enter your customer list.
finished
tell a friend contact us privacy policy what's new products/pricing
325
326

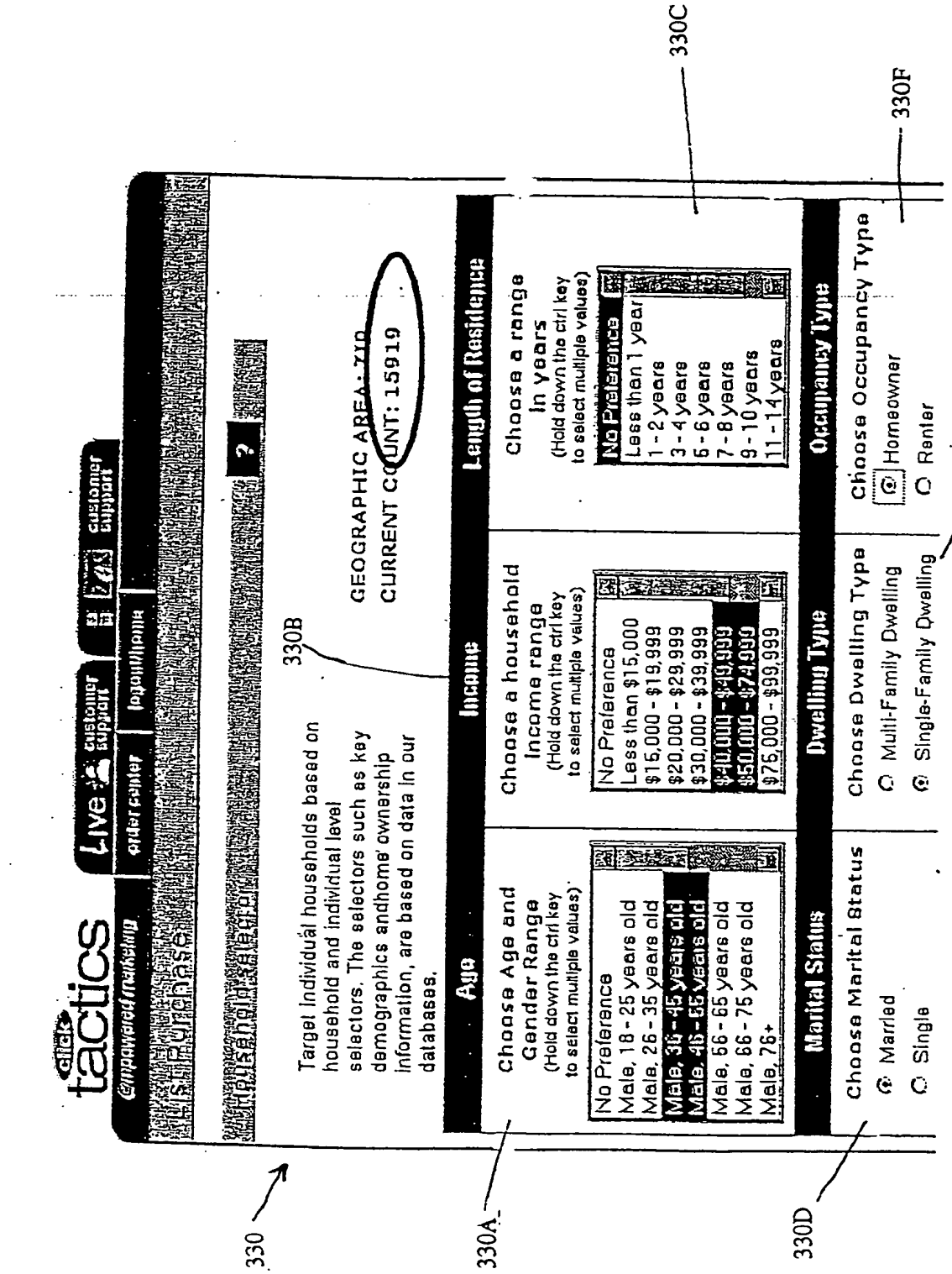

330
330A
330B
330C
330D
330E
330F
Target Individual households based on household and individual level selectors. The selectors such as key demographics andhome ownership information, are based on data in our databases.
GEOGRAPHIC AREA: ZIP
CURRENT COUNT: 15919
Age
Choose Age and Gender Range
(Hold down the ctrl key to select multiple values)
No Preference
Male, 18 - 25 years old
Male, 26 - 35 years old
Male, 36 - 45 years old
Male, 46 - 65 years old
Male, 66 - 75 years old
Male, 76+
Income
Choose a household Income range
(Hold down the ctrl key to select multiple values)
No Preference
Less than $15,000
$15,000 - $19,999
$20,000 - $29,999
$30,000 - $39,999
$40,000 - $49,999
$50,000 - $74,999
$75,000 - $99,999
Length of Residence
Choose a range in years
(Hold down the ctrl key to select multiple values)
No Preference
Less than 1 year
1 - 2 years
3 - 4 years
5 - 6 years
7 - 8 years
9 - 10 years
11 - 14 years
Marital Status
Choose Marital Status
Married
Single
Dwelling Type
Choose Dwelling Type
Multi-Family Dwelling
Single-Family Dwelling
Occupancy Type
Choose Occupancy Type
Homeowner
Renter

Fig. 15A

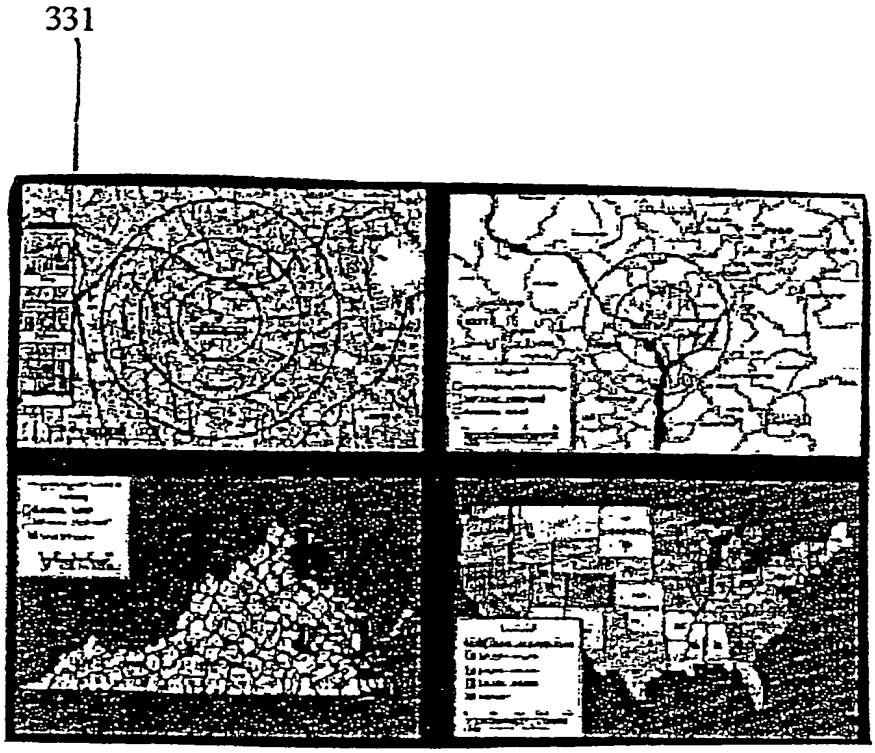


Fig. 15B

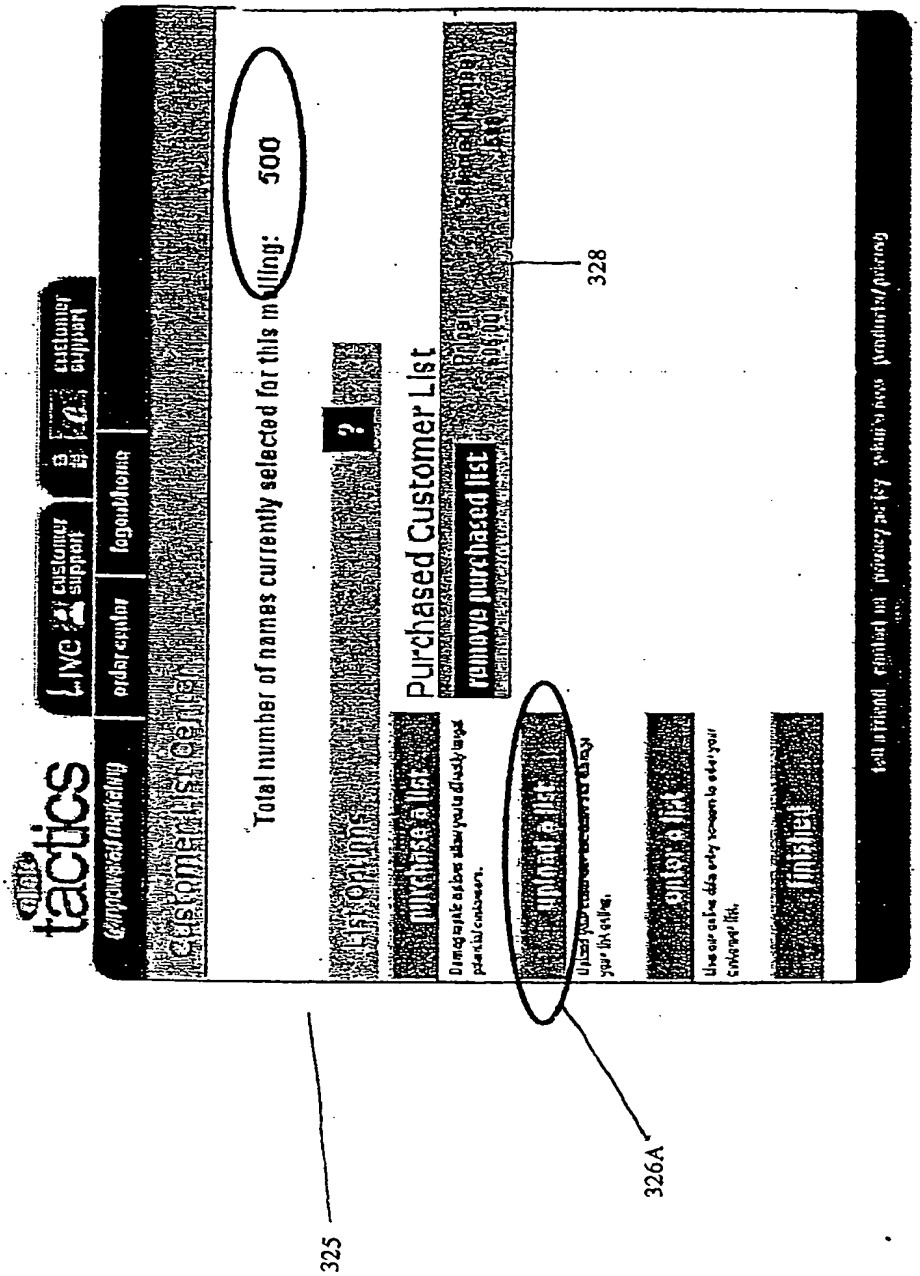
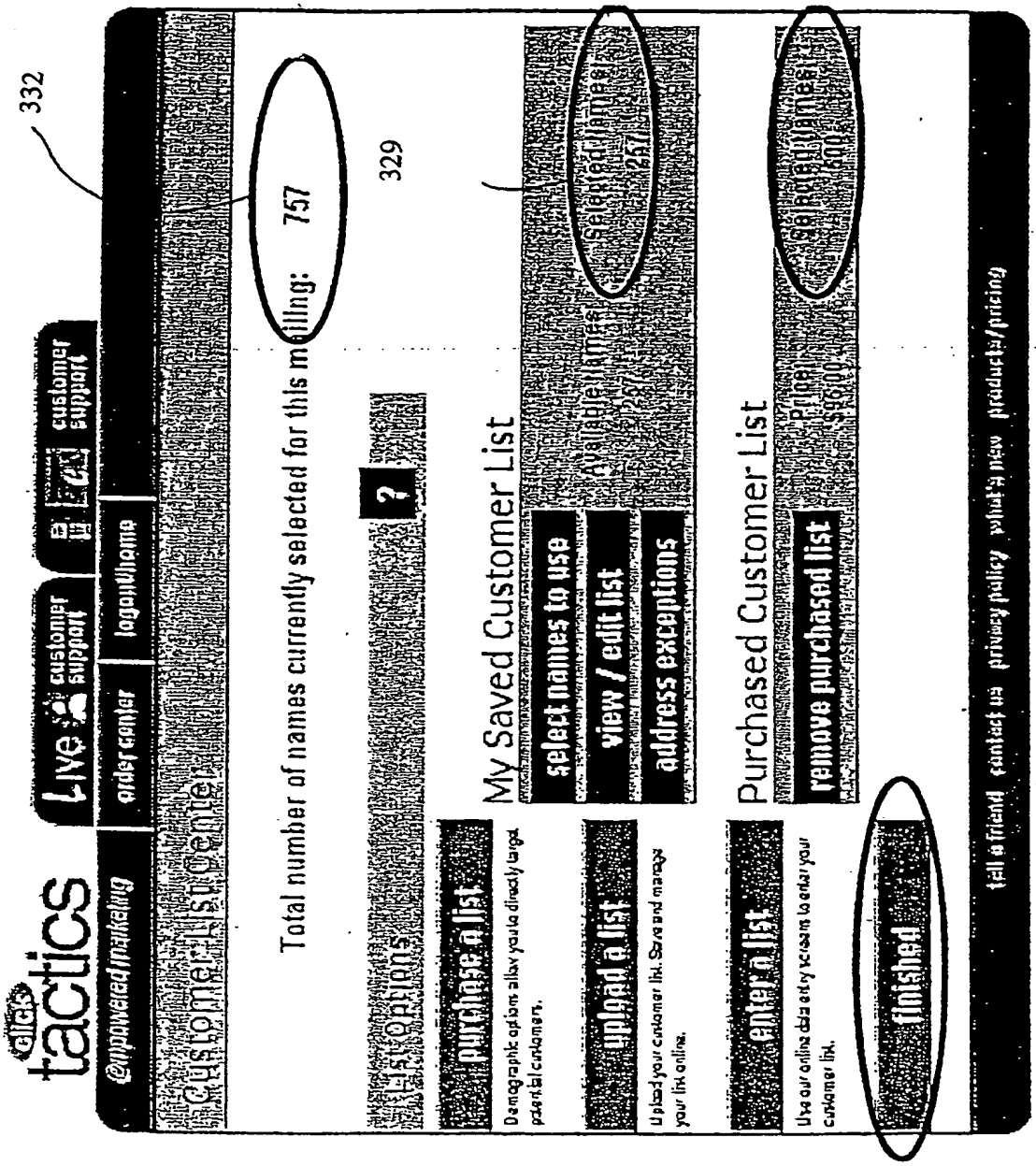

tactics
Live
customer support
order center
logout/home
customer support
Total number of names currently selected for this mailing: 500
?
Purchased Customer List
remove purchased list
328
325
326A

Fig. 16

Fig. 17


332
clicktactics
@inpowered marketing
order center
customer support
logon/name
customer support
Customer list generation
Total number of names currently selected for this mailing: 757
329
?
My Saved Customer List
select names to use
view / edit list
address exceptions
Purchased Customer List
remove purchased list
purchase a list
Demographic options allow you to directly target potential customers.
upload a list
Upload your customer list. Save and manage your list online.
enter a list
Use our online data entry screens to enter your customer list.
finished
tell a friend contact us privacy policy what's new products/pricing

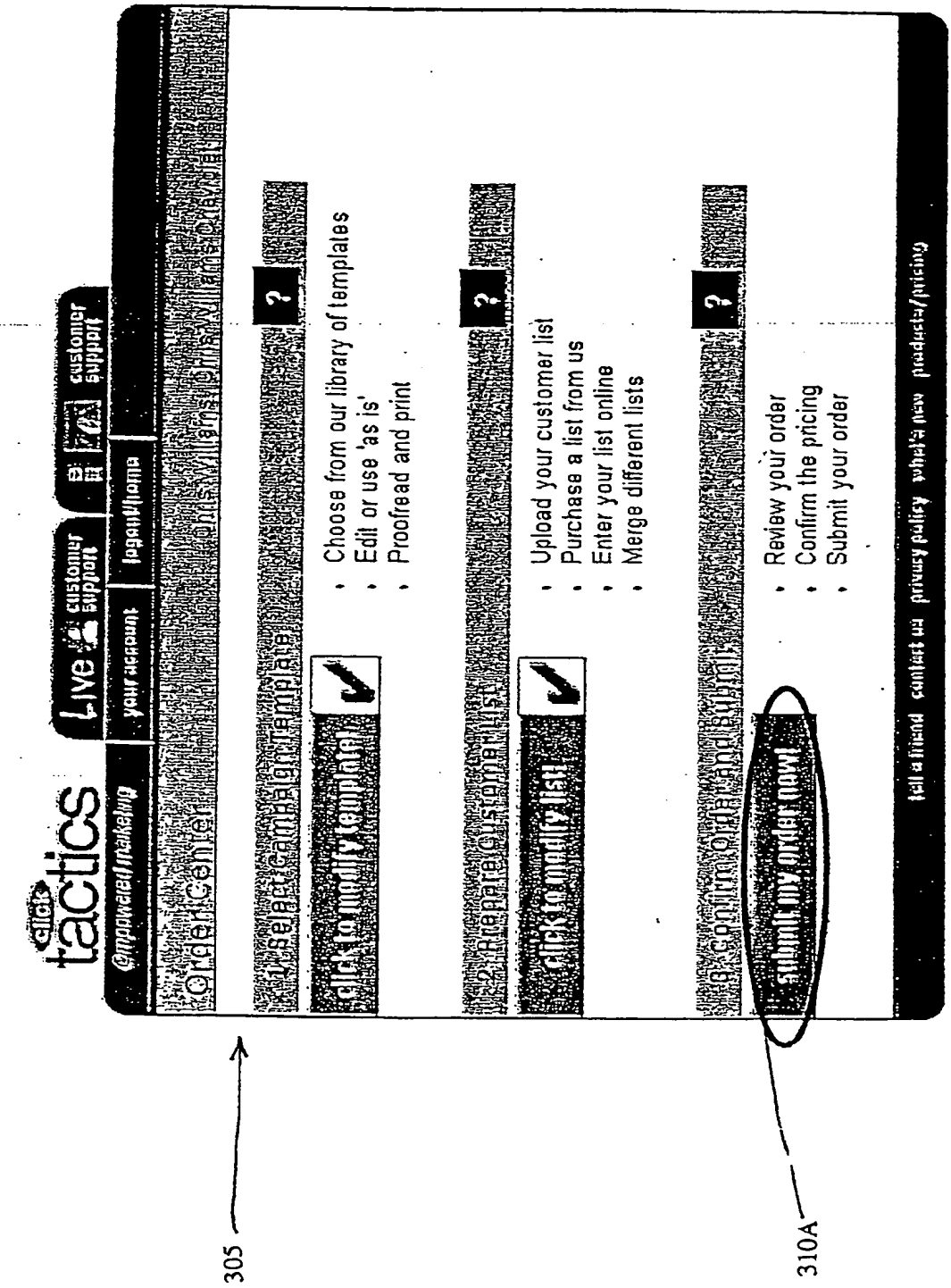

tactics
Live
customer support
your account
logout/home
customer support
orders center
1. Select a campaign template
click to modify template
Choose from our library of templates
Edit or use 'as is'
Proofread and print
2. Prepare customer list
click to modify list
Upload your customer list
Purchase a list from us
Enter your list online
Merge different lists
3. Confirm order and submit
submit my order now!
Review your order
Confirm the pricing
Submit your order
tell a friend
contact us
privacy policy
what's new
products/pricing
305
310A

Fig.18

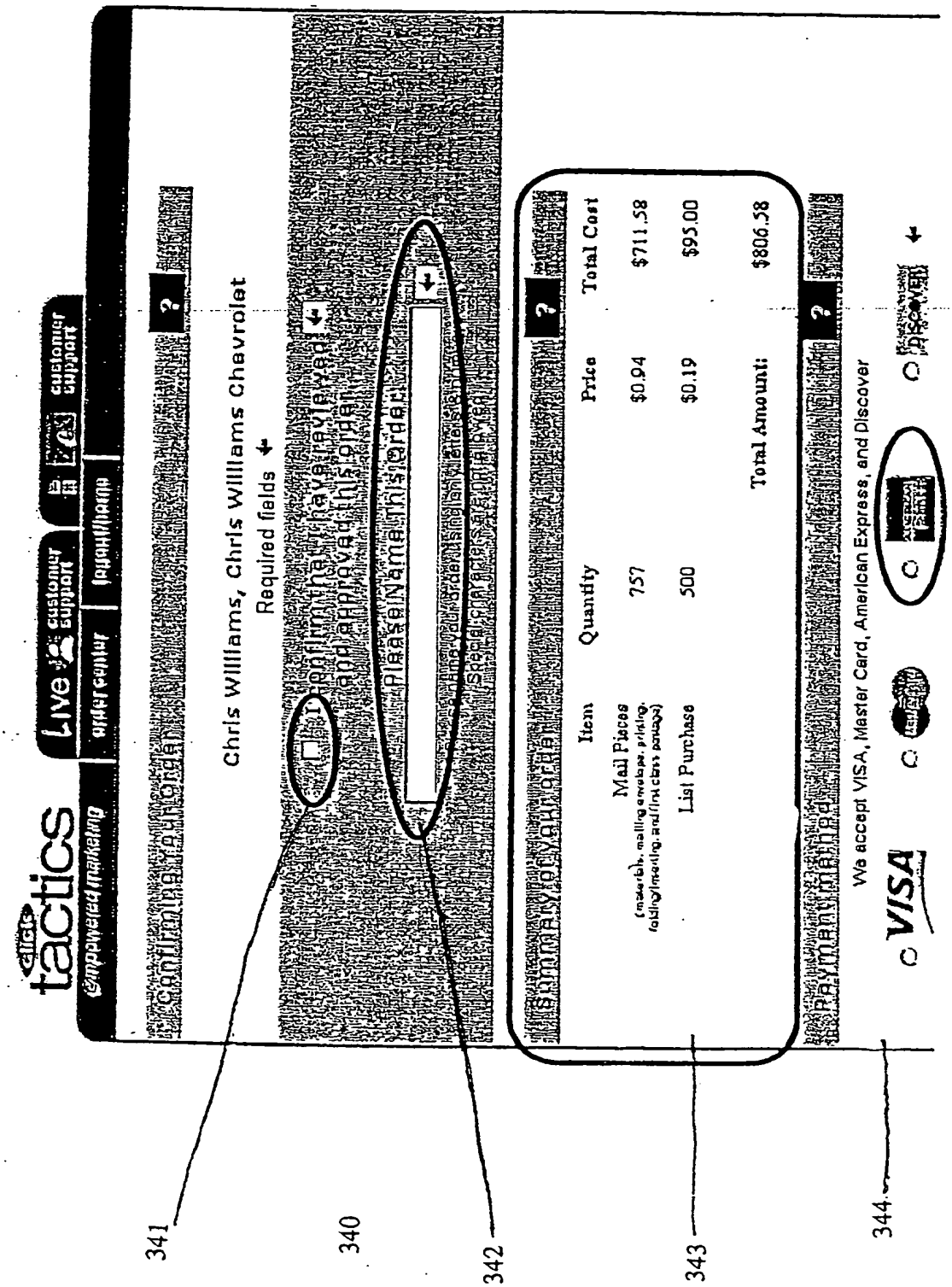
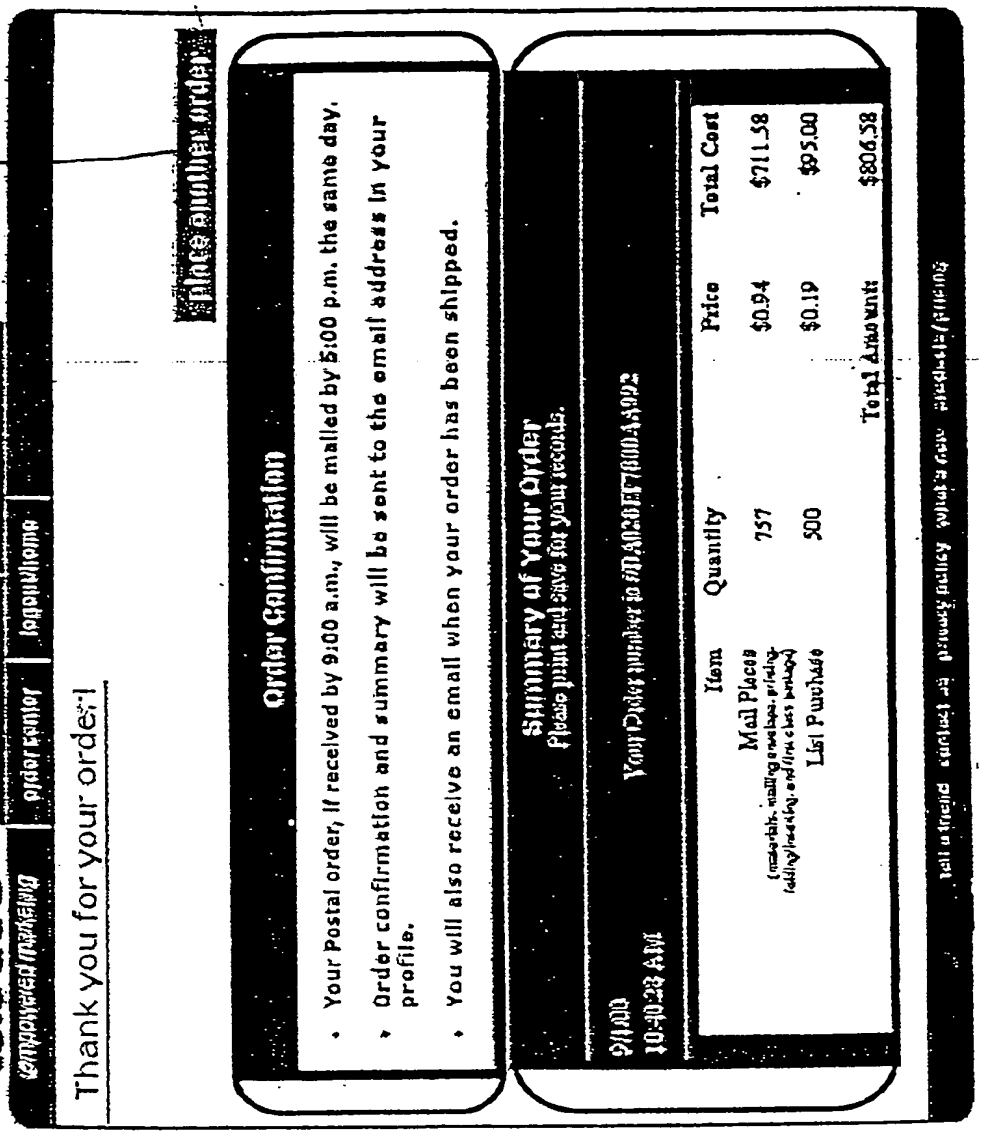

tactics
Empowered Marketing
order center
customer support
Live
Chris Williams, Chris Williams Chevrolet
Required fields
Item
Quantity
Price
Total Cost
Mail Pieces
757
$0.94
$711.58
List Purchase
500
$0.19
$95.00
Total Amount:
$806.58
We accept VISA, Master Card, American Express, and Discover
VISA
341
340
342
343
344

Fig. 19

Fig 20


346
345
tactics
empowered marketing
order center
logon/home
customer support
Thank you for your order!
place another order
Order Confirmation
Your Postal order, if received by 9:00 a.m., will be mailed by 5:00 p.m. the same day.
Order confirmation and summary will be sent to the email address in your profile.
You will also receive an email when your order has been shipped.
Summary of Your Order
Please print and save for your records.
Item
Quantity
Price
Total Cost
Mail Places
757
$0.94
$711.58
List Purchase
500
$0.19
$95.00
Total Amount
$806.58

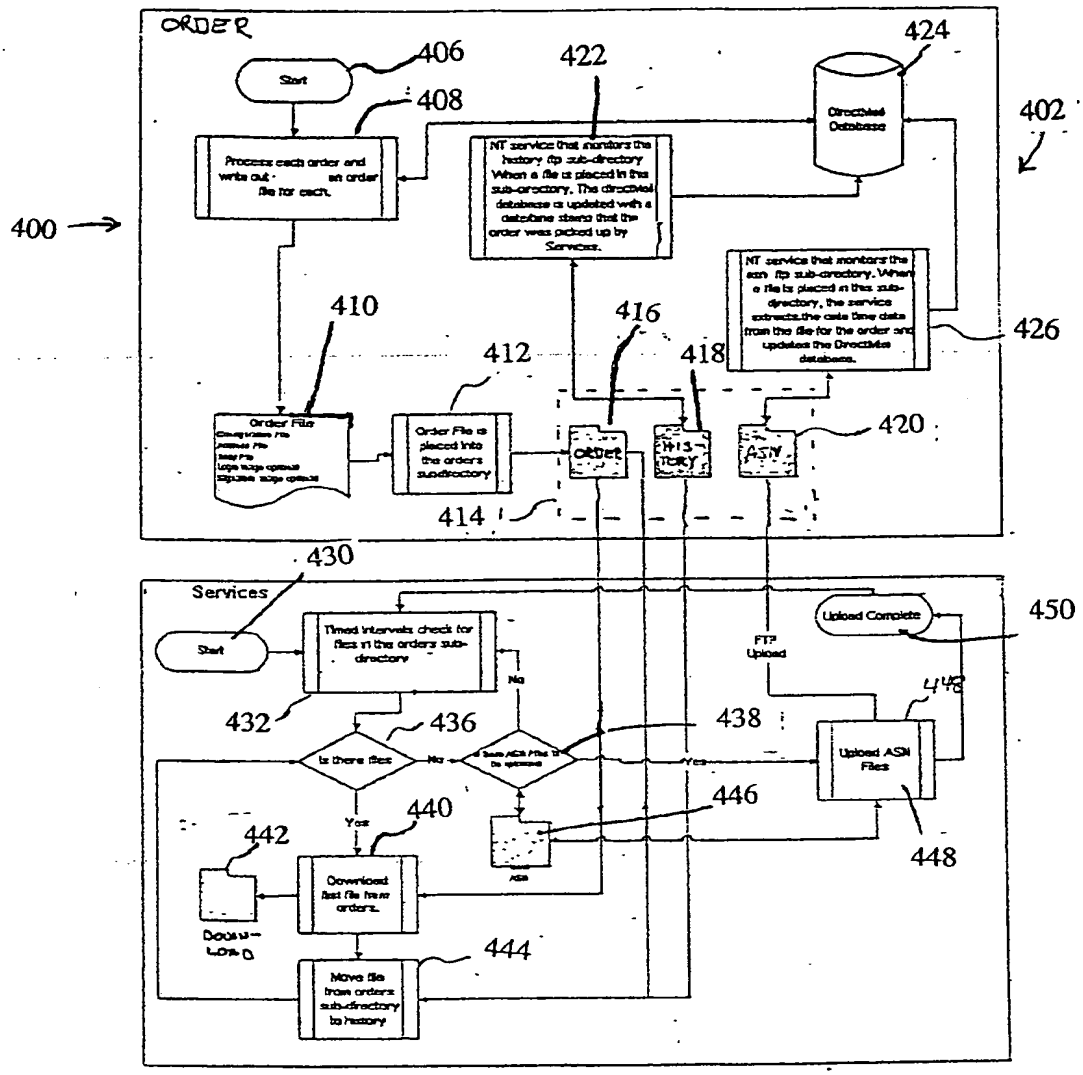

ORDER
Start
406
408
422
424
Directtel Database
402
400
Process each order and write out an order file for each.
NT service that monitors the history ftp sub-directory When a file is placed in this sub-directory, The directtel database is updated with a date/time stamp that the order was picked up by Services.
NT service that monitors the asn ftp sub-directory. When a file is placed in this sub-directory, the service extracts the date time data from the file for the order and updates the Directtel database.
426
410
412
416
418
420
Order File
Order File is placed into the orders subdirectory
ORDER
HISTORY
ASN
414
430
Services
Start
Timed intervals check for files in the orders sub-directory
No
Upload Complete
450
FTP Upload
432
436
438
Is there files
No
Yes
Upload ASN Files
446
440
442
448
Download files from orders
Docu-ment
444
Move file from orders sub-directory to history

Fig. 21

404

360

You Don't Have to Pay High Prices For Auto Maintenance!

362

tactics

Click Tactics Inc.
2400 Commerce Avenue
Building 100, Suite 200
Duluth, GA 30096

Save Up To $2500 On A New Car or Truck! You're Pre-Qualified!

Mr. Tom Hill
4500 Mason Avenue
Anywhere, USA 77777

Dear Mr. Hill,

We're offering area residents the opportunity to buy any new car on our lot at a substantial savings. Stop by to look over our wide selection of new vehicles, pick out the new car or truck you want, and buy it at THE FACTORY INVOICE PRICE. This will enable you to *SAVE up to $2,500* on the new vehicle you select.

We also offer you another advantage that you may not find at other dealerships. Our salespeople are not pushy. Their goal is to insure that you get the vehicle you want and are completely satisfied with your shopping experience. I know this is true, because I stress customer service with all our personnel on a daily basis. If you are not satisfied with the salesperson assisting you, have me paged when you're in the dealership, and I personally will help you select the car that's right for you.

We also offer you another advantage that you may not find at other dealerships. Our salespeople are not pushy. Their goal is to insure that you get the vehicle you want and are completely satisfied with your shopping experience. I know this is true, because I stress customer service with all our personnel on a daily basis. If you are not satisfied with the salesperson assisting you, have me paged when you're in the dealership, and I personally will help you select the car that's right for you.

You should also know that we will give you top dollar for any trade-in. It's the fair thing to do, and we truly want to earn your business.

Hope to see you soon.

Best Regards,

John Smith

John Smith
Dealer

*P.S. We're offering area residents the opportunity to buy any new car on our lot at a substantial savings. Stop by to look over our wide selection of new vehicles, pick out the new car or truck you want, and buy it at THE FACTORY INVOICE PRICE. This will enable you to SAVE up to $2,500 on the new vehicle you select.

Fig. 22

```
- <CTIDocument PrintMethod="HighlightColor" HighlightColor="0000FF">
  - <Page ID="1" Size="Letter" Width="8.5in" Height="11.0in"
      StockID="WHITELETTER" Orientation="Portrait" PageNumber="1">
    - <Side Face="Front" PreviewFile="Sample_CTI_Letter.jpg">
      - <Area ID="1" Top="0.25in" Left="0.625in" Width="6.5in" ZOrder="0"
          Orientation="0">
        - <Text>
          - <Paragraph Alignment="LEFT" Bulleted="False" BulletIndent=""
              BulletTextIndent="">
            - <Line Spacing="31.668">
              - <TextFragment Type="Static" VarName=""
                FontName="Serpentine-BoldOblique" Size="28"
                Underline="False" ForeColor="0000FF" BackColor="">
                  <![CDATA[ You Don't Have to Pay High ]]>
                </TextFragment>
              </Line>
            - <Line Spacing="31.668">
              - <TextFragment Type="Static" VarName=""
                FontName="Serpentine-BoldOblique" Size="28"
                Underline="False" ForeColor="0000FF" BackColor="">
                  <![CDATA[ Prices For Auto Maintenance! ]]>
                </TextFragment>
              </Line>
            </Paragraph>
          </Text>
        </Area>
      + <Area ID="2" Top="1.1875in" Left="0.625in" Width="1.0833in" ZOrder="0"
          Orientation="0">
      + <Area ID="3" Top="1.6875in" Left="0.625in" Width="2.5in" ZOrder="0"
          Orientation="0">
      + <Area ID="4" Top="1.625in" Left="4.4375in" Width="3.75in" ZOrder="0"
          Orientation="0">
      + <Area ID="5" Top="2.75in" Left="4.4375in" Width="3.75in" ZOrder="0"
          Orientation="0">
      + <Area ID="6" Top="2.875in" Left="0.625in" Width="3.0in" ZOrder="0"
          Orientation="0">
      + <Area ID="7" Top="4.375in" Left="0.625in" Width="3.5in" ZOrder="0"
          Orientation="0">
      + <Area ID="8" Top="4.75in" Left="0.625in" Width="7.25in" ZOrder="0"
          Orientation="0">
      + <Area ID="9" Top="7.9375in" Left="0.625in" Width="3.0in" ZOrder="0"
          Orientation="0">
      + <Area ID="10" Top="8.125in" Left="0.625in" Width="3.0in" ZOrder="0"
          Orientation="0">
      + <Area ID="11" Top="8.625in" Left="0.625in" Width="3.0in" ZOrder="0"
          Orientation="0">
      + <Area ID="12" Top="9.25in" Left="0.625in" Width="7.25in" ZOrder="0"
          Orientation="0">
      + <Area ID="13" Top="10.0in" Left="0.625in" Width="7.25in" ZOrder="0"
          Orientation="0">
      </Side>
    </Page>
```

Fig 23

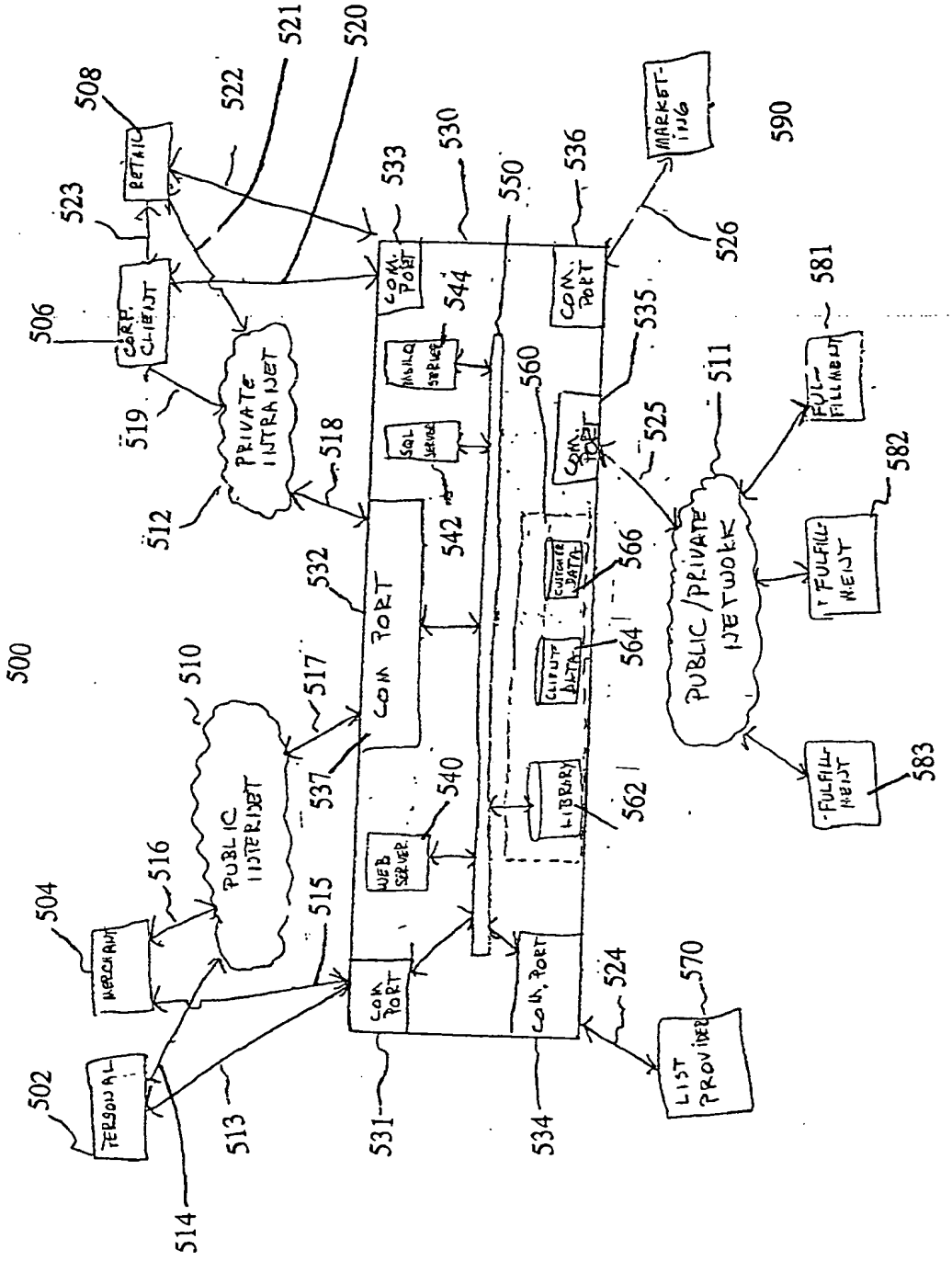

500
502
504
506
508
510
512
513
514
515
516
517
518
519
520
521
522
523
524
526
530
531
532
533
534
535
536
537
540
542
544
550
560
562
564
566
570
581
582
583
590
511
525
PERSONAL
MERCHANT
CORP. CLIENT
RETAIL
PUBLIC INTERNET
PRIVATE INTRANET
COM PORT
WEB SERVER
SQL SERVER
MAILQ SERVER
LIBRARY
CUSTOMER DATA
CLIENT DATA
LIST PROVIDER
MARKET-ING
PUBLIC/PRIVATE INTERNETWORK
FULFILLMENT
FULFILLMENT
FULFILLMENT

Fig 24

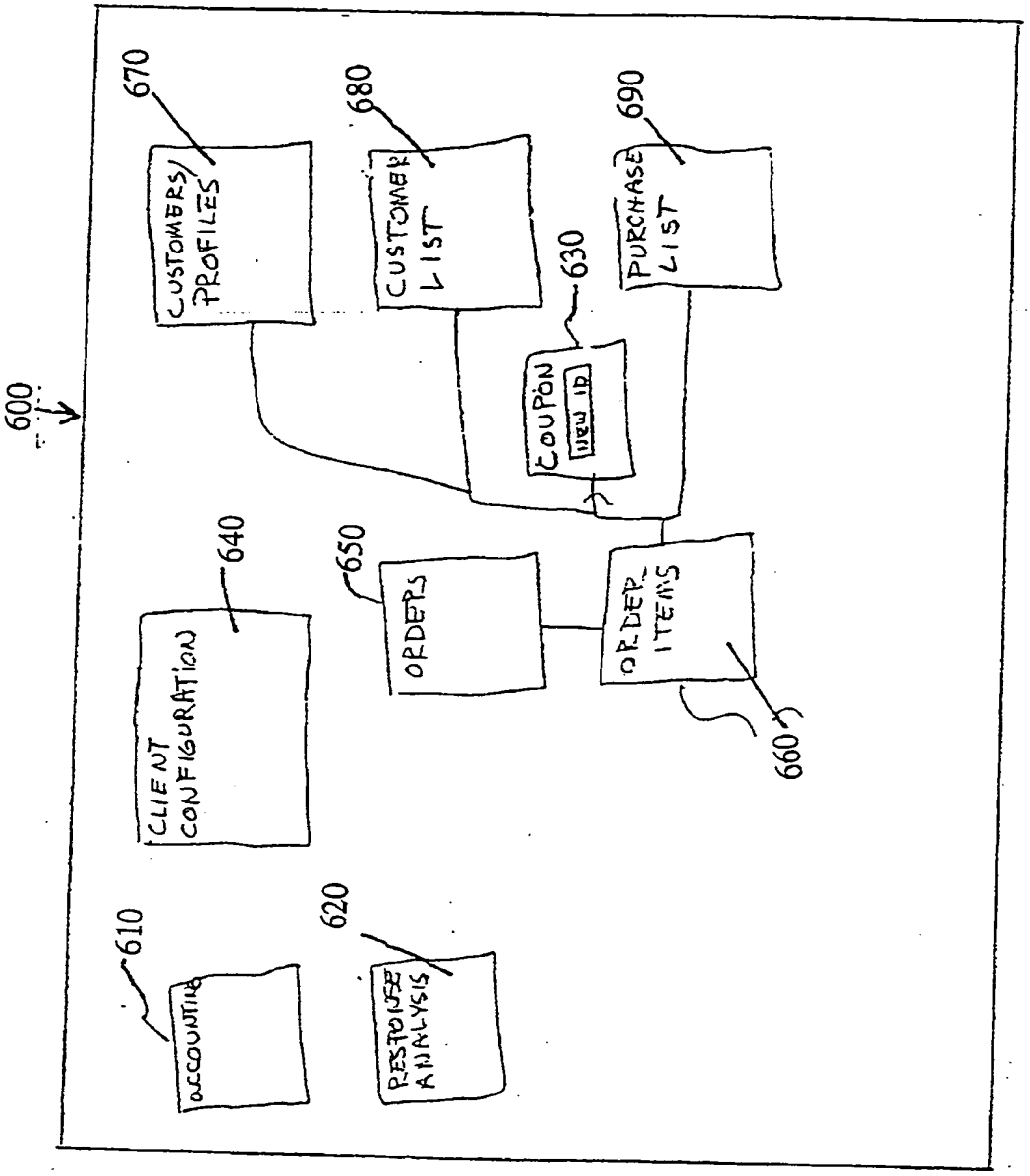

600
670
CUSTOMERS PROFILES
680
CUSTOMER LIST
690
PURCHASE LIST
630
COUPON
ITEM ID
640
CLIENT CONFIGURATION
650
ORDERS
ORDER ITEMS
660
610
ACCOUNTING
620
RESPONSE ANALYSIS

Fig 25

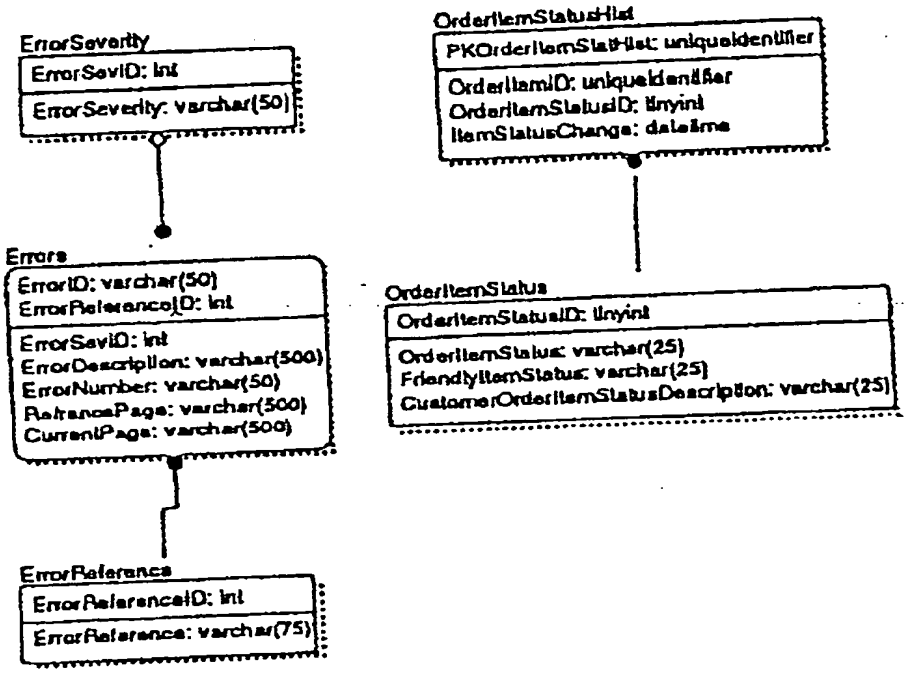

ErrorSeverity
ErrorSevID: Int
ErrorSeverity: varchar(50)
OrderItemStatusHist
PKOrderItemStatHist: uniqueIdentifier
OrderItemID: uniqueIdentifier
OrderItemStatusID: tinyint
ItemStatusChange: datetime
Errors
ErrorID: varchar(50)
ErrorReferenceID: Int
ErrorSevID: Int
ErrorDescription: varchar(500)
ErrorNumber: varchar(50)
ReferencePage: varchar(500)
CurrentPage: varchar(500)
OrderItemStatus
OrderItemStatusID: tinyint
OrderItemStatus: varchar(25)
FriendlyItemStatus: varchar(25)
CustomerOrderItemStatusDescription: varchar(25)
ErrorReference
ErrorReferenceID: Int
ErrorReference: varchar(75)

Fig. 26A

26B1

26B2

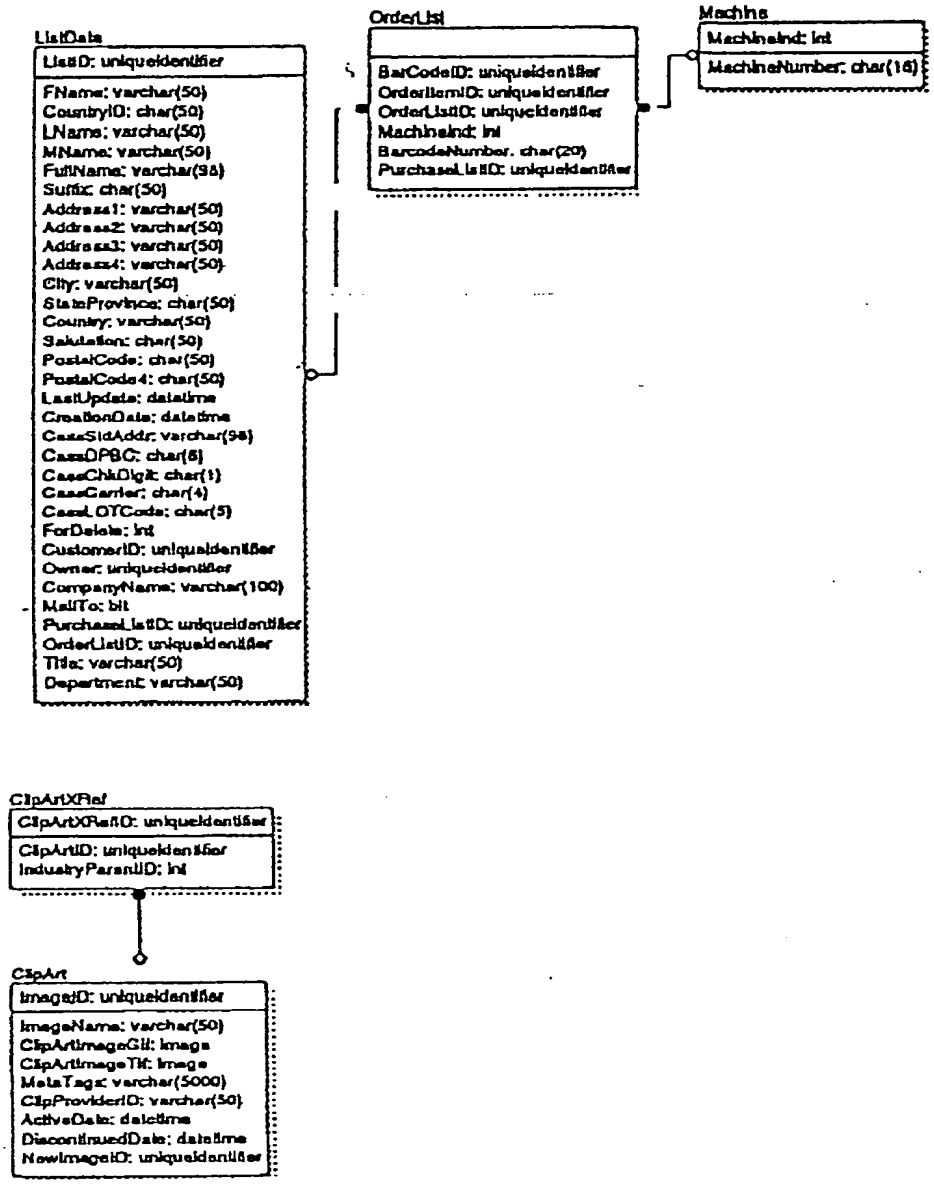


Fig. 26B

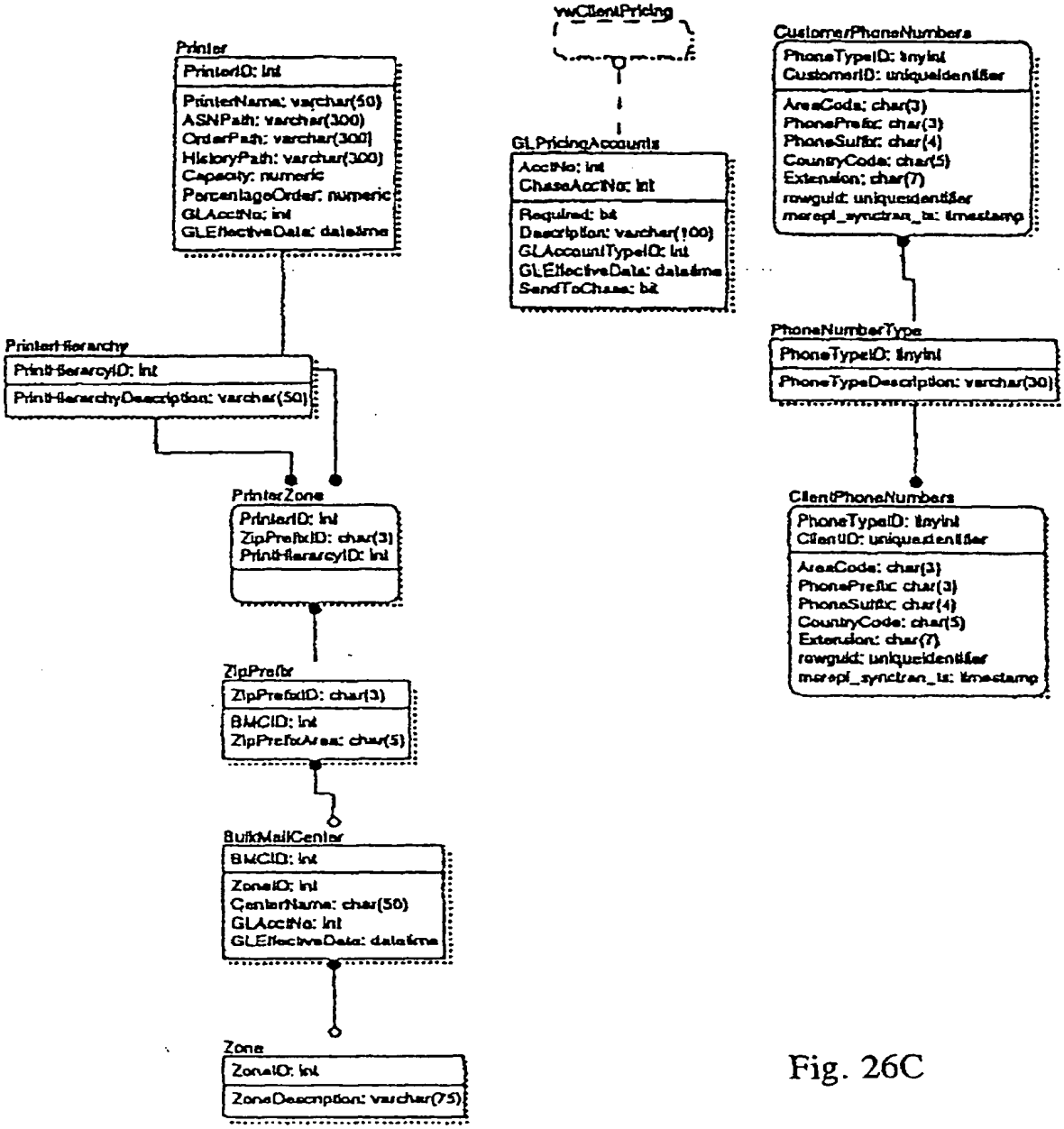

vwClientPricing
Printer
PrinterID: Int
PrinterName: varchar(50)
ASNPath: varchar(300)
OrderPath: varchar(300)
HistoryPath: varchar(300)
Capacity: numeric
PercentageOrder: numeric
GLAcctNo: int
GLEffectiveDate: datetime
GLPricingAccounts
AcctNo: int
ChaseAcctNo: int
Required: bit
Description: varchar(100)
GLAccountTypeID: int
GLEffectiveDate: datetime
SendToChase: bit
CustomerPhoneNumbers
PhoneTypeID: tinyint
CustomerID: uniqueidentifier
AreaCode: char(3)
PhonePrefix: char(3)
PhoneSuffix: char(4)
CountryCode: char(5)
Extension: char(7)
rowguid: uniqueidentifier
merepl_synctran_ts: timestamp
PrinterHierarchy
PrintHierarcyID: Int
PrintHierarchyDescription: varchar(50)
PhoneNumberType
PhoneTypeID: tinyint
PhoneTypeDescription: varchar(30)
PrinterZone
PrinterID: Int
ZipPrefixID: char(3)
PrintHierarcyID: Int
ClientPhoneNumbers
PhoneTypeID: tinyint
ClientID: uniqueidentifier
AreaCode: char(3)
PhonePrefix: char(3)
PhoneSuffix: char(4)
CountryCode: char(5)
Extension: char(7)
rowguid: uniqueidentifier
merepl_synctran_ts: timestamp
ZipPrefix
ZipPrefixID: char(3)
BMCID: Int
ZipPrefixArea: char(5)
BulkMailCenter
BMCID: Int
ZoneID: Int
CenterName: char(50)
GLAcctNo: Int
GLEffectiveDate: datetime
Zone
ZoneID: Int
ZoneDescription: varchar(75)

Fig. 26C

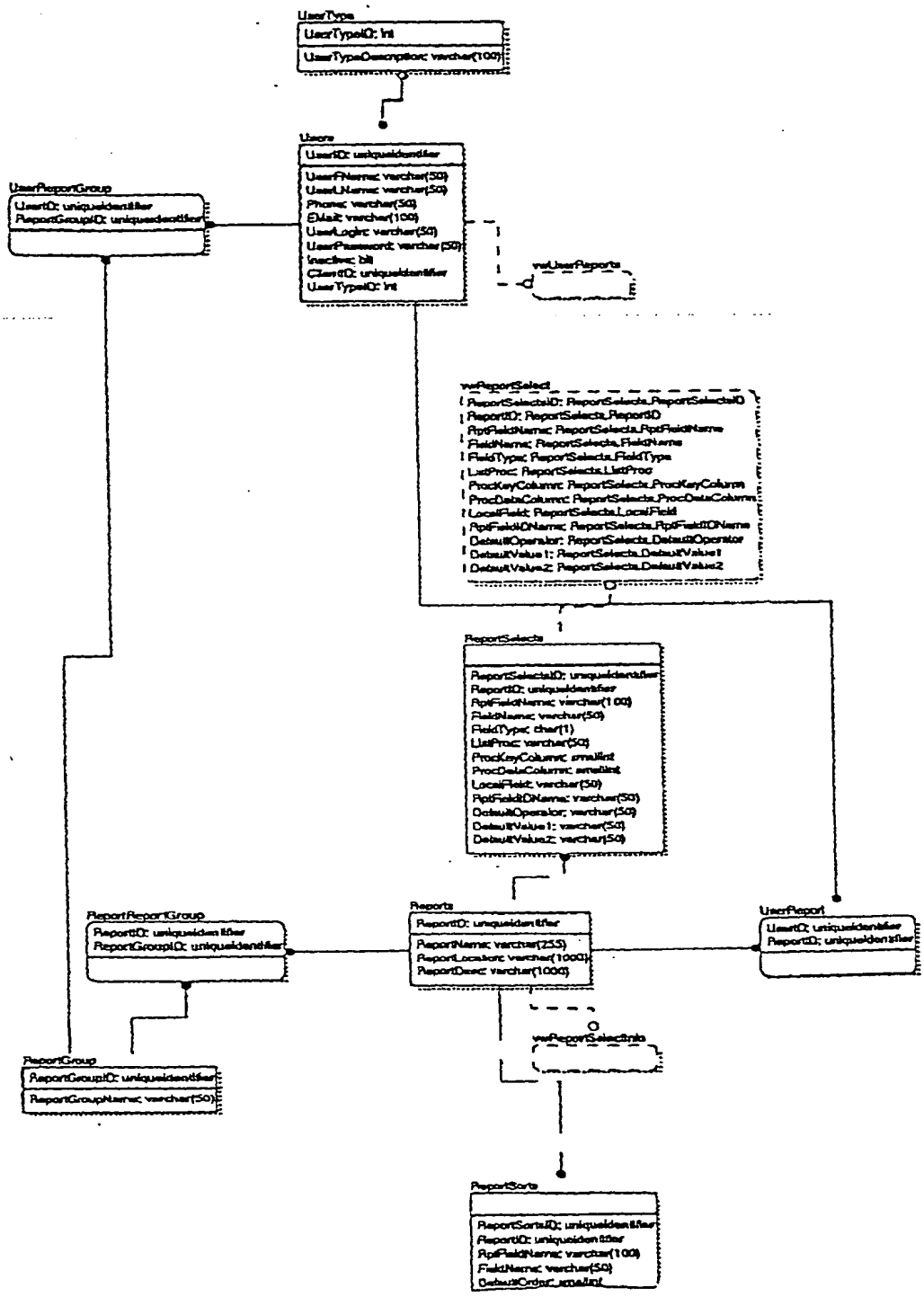

UserType
UserTypeID: Int
UserTypeDescription: varchar(100)
Users
UserID: uniqueidentifier
UserFName: varchar(50)
UserLName: varchar(50)
Phone: varchar(50)
EMail: varchar(100)
UserLogin: varchar(50)
UserPassword: varchar(50)
Inactive: bit
ClientID: uniqueidentifier
UserTypeID: Int
vwUserReports
UserReportGroup
UserID: uniqueidentifier
ReportGroupID: uniqueidentifier
vwReportSelect
ReportSelectsID: ReportSelects.ReportSelectsID
ReportID: ReportSelects.ReportID
RptFieldName: ReportSelects.RptFieldName
FieldName: ReportSelects.FieldName
FieldType: ReportSelects.FieldType
ListProc: ReportSelects.ListProc
ProcKeyColumn: ReportSelects.ProcKeyColumn
ProcDataColumn: ReportSelects.ProcDataColumn
LocalField: ReportSelects.LocalField
RptFieldIDName: ReportSelects.RptFieldIDName
DefaultOperator: ReportSelects.DefaultOperator
DefaultValue1: ReportSelects.DefaultValue1
DefaultValue2: ReportSelects.DefaultValue2
1
ReportSelects
ReportSelectsID: uniqueidentifier
ReportID: uniqueidentifier
RptFieldName: varchar(100)
FieldName: varchar(50)
FieldType: char(1)
ListProc: varchar(50)
ProcKeyColumn: smallint
ProcDataColumn: smallint
LocalField: varchar(50)
RptFieldIDName: varchar(50)
DefaultOperator: varchar(50)
DefaultValue1: varchar(50)
DefaultValue2: varchar(50)
ReportReportGroup
ReportID: uniqueidentifier
ReportGroupID: uniqueidentifier
Reports
ReportID: uniqueidentifier
ReportName: varchar(255)
ReportLocation: varchar(1000)
ReportDesc: varchar(1000)
UserReport
UserID: uniqueidentifier
ReportID: uniqueidentifier
vwReportSelectInfo
ReportGroup
ReportGroupID: uniqueidentifier
ReportGroupName: varchar(50)
ReportSorts
ReportSortsID: uniqueidentifier
ReportID: uniqueidentifier
RptFieldName: varchar(100)
FieldName: varchar(50)
DefaultOrder: smallint

Fig. 26D

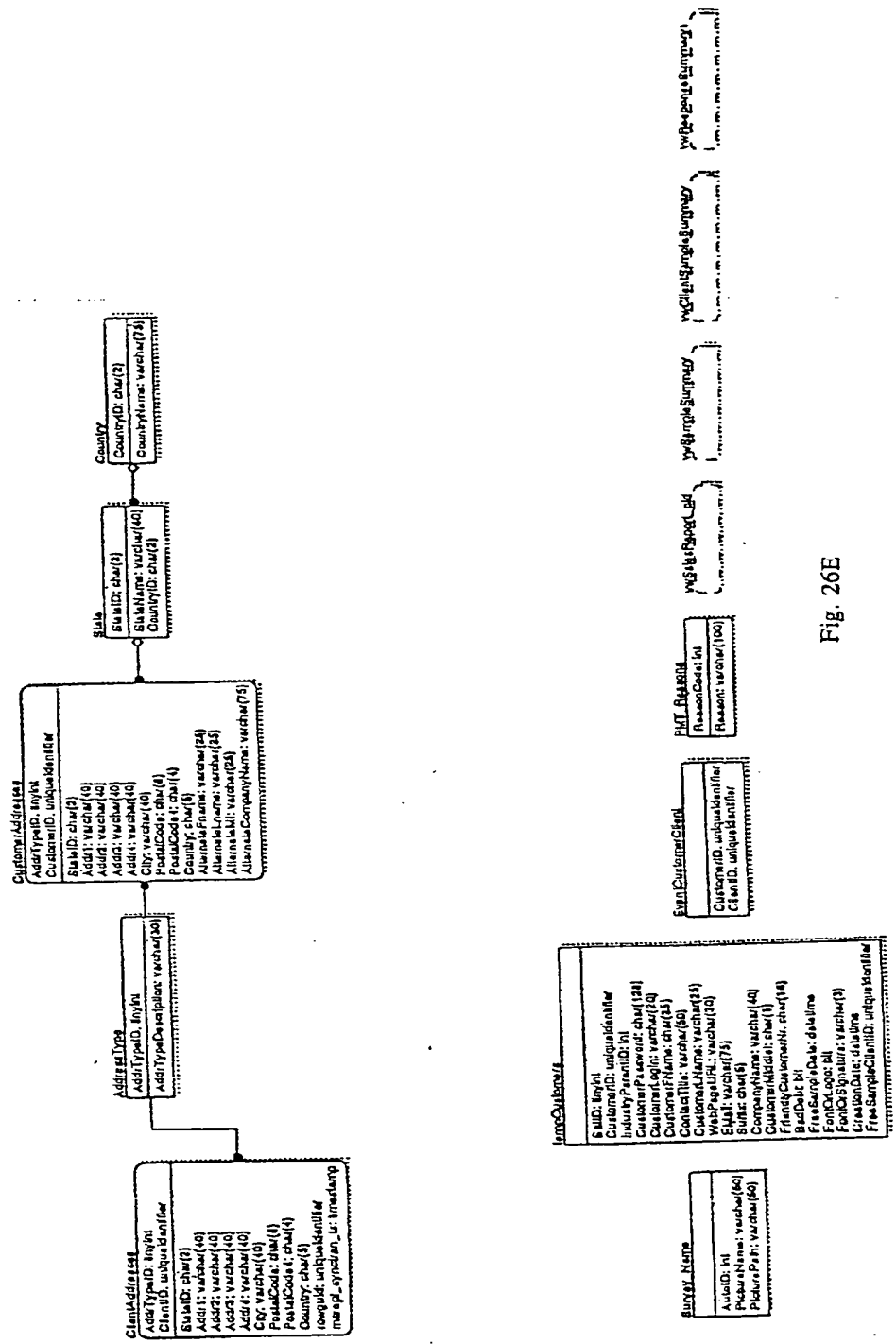


Fig. 26E

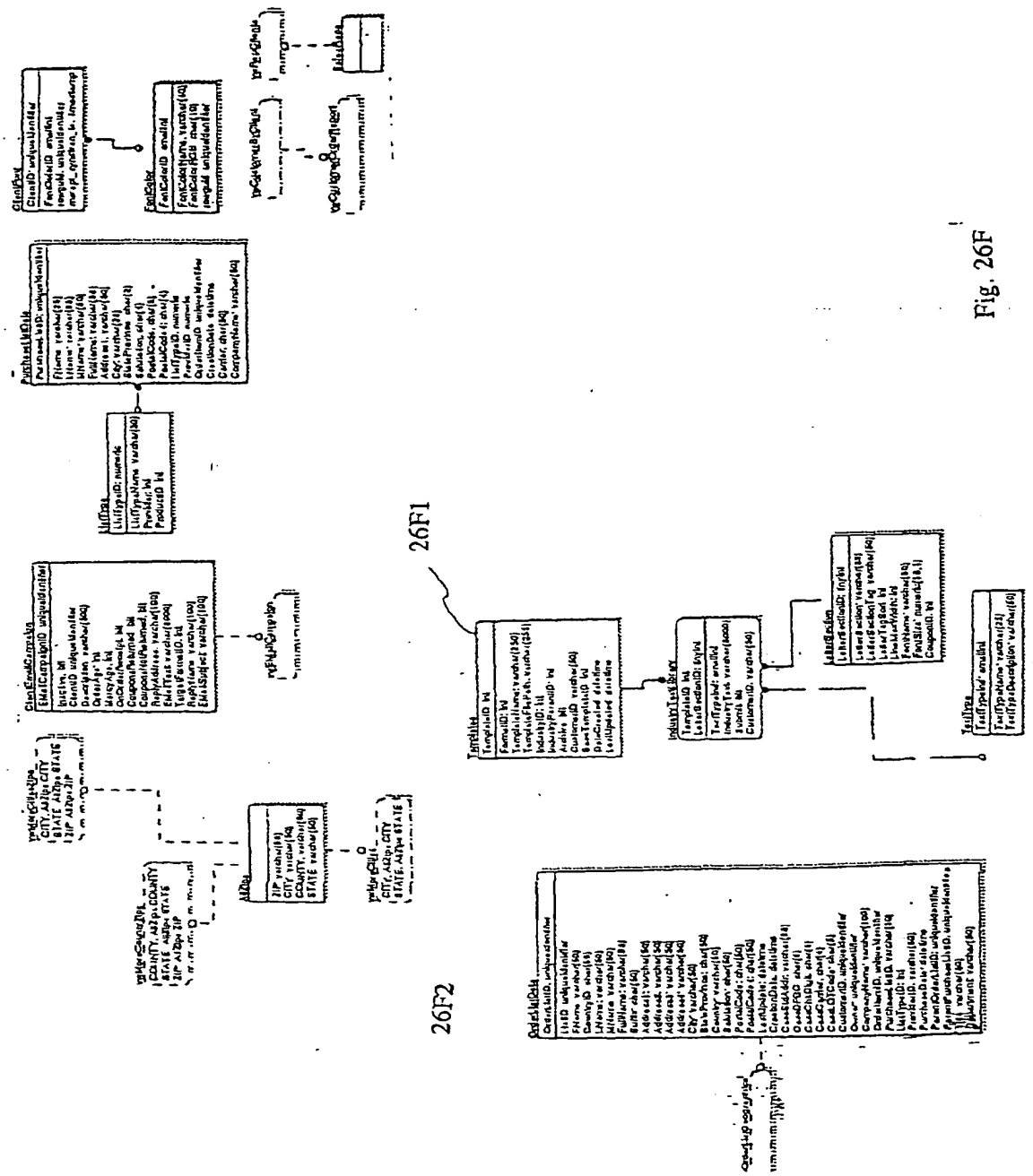


Fig. 26F

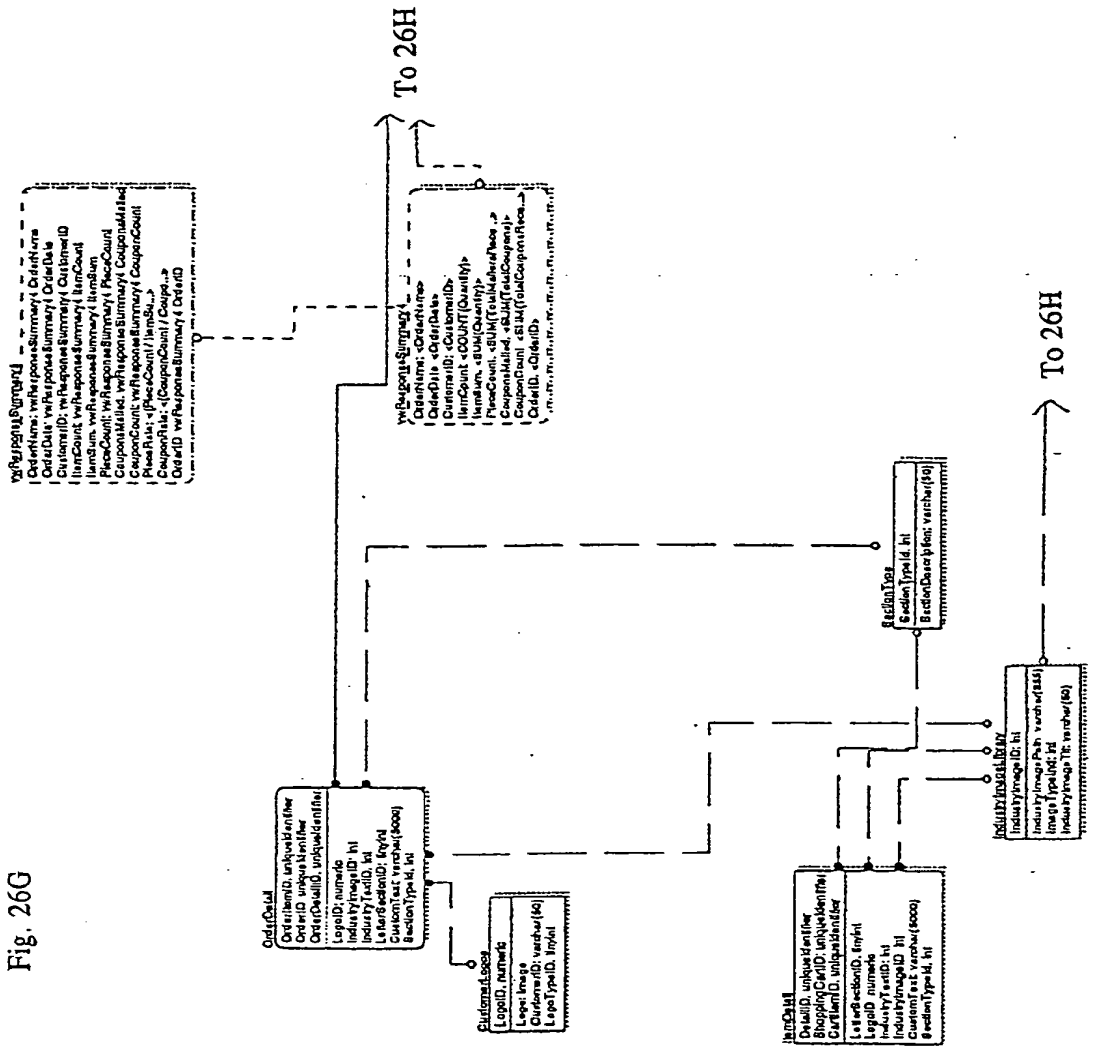


Fig. 26G

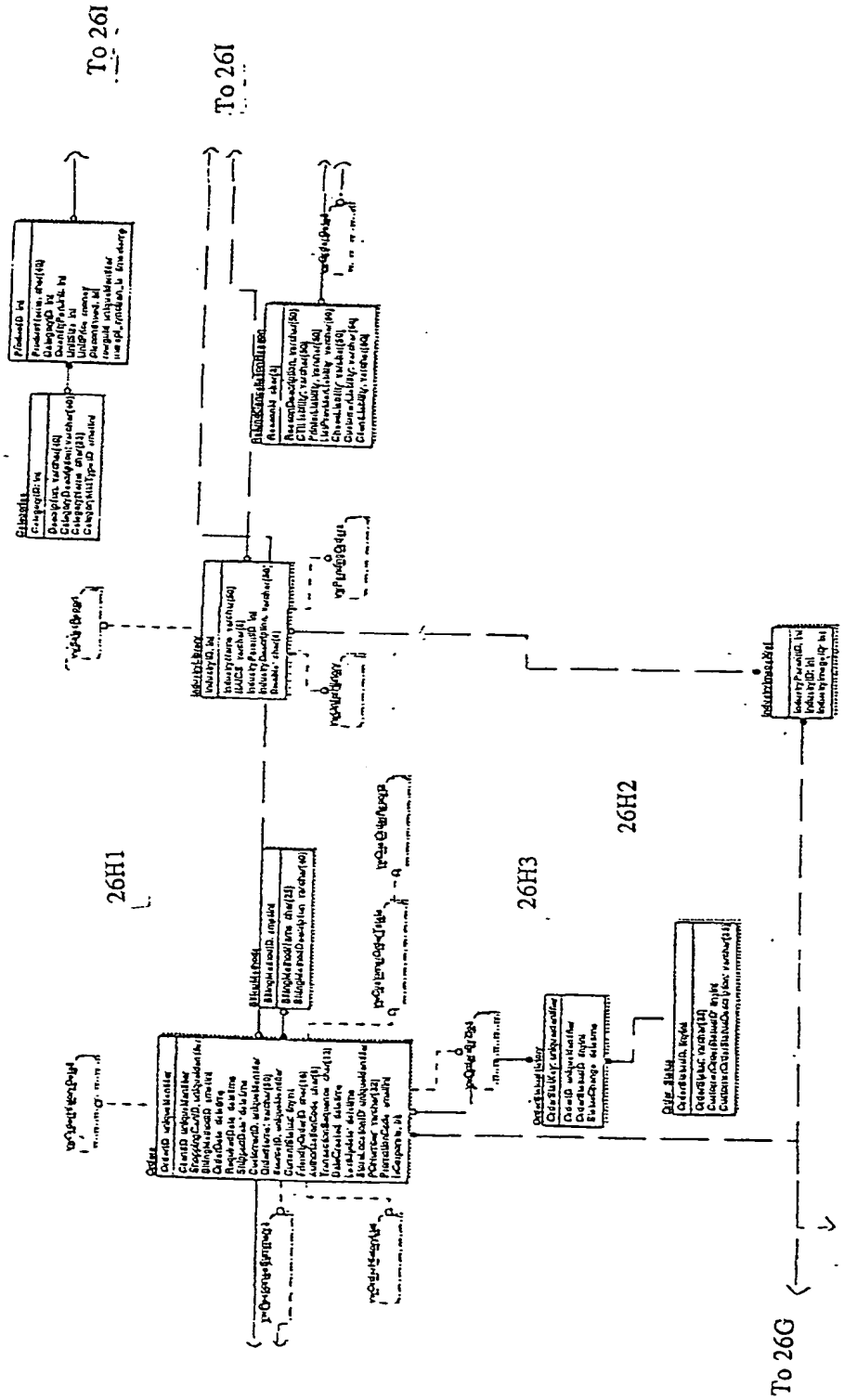


Fig. 26H

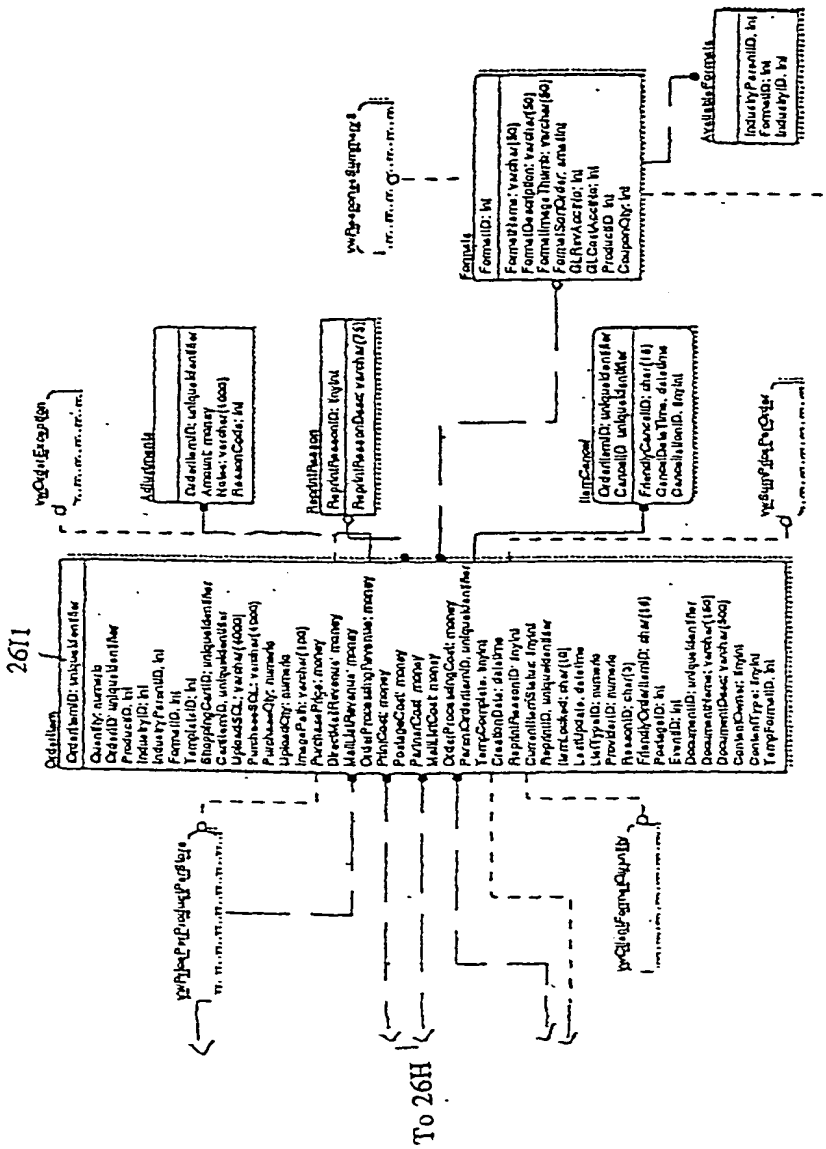


Fig. 26I

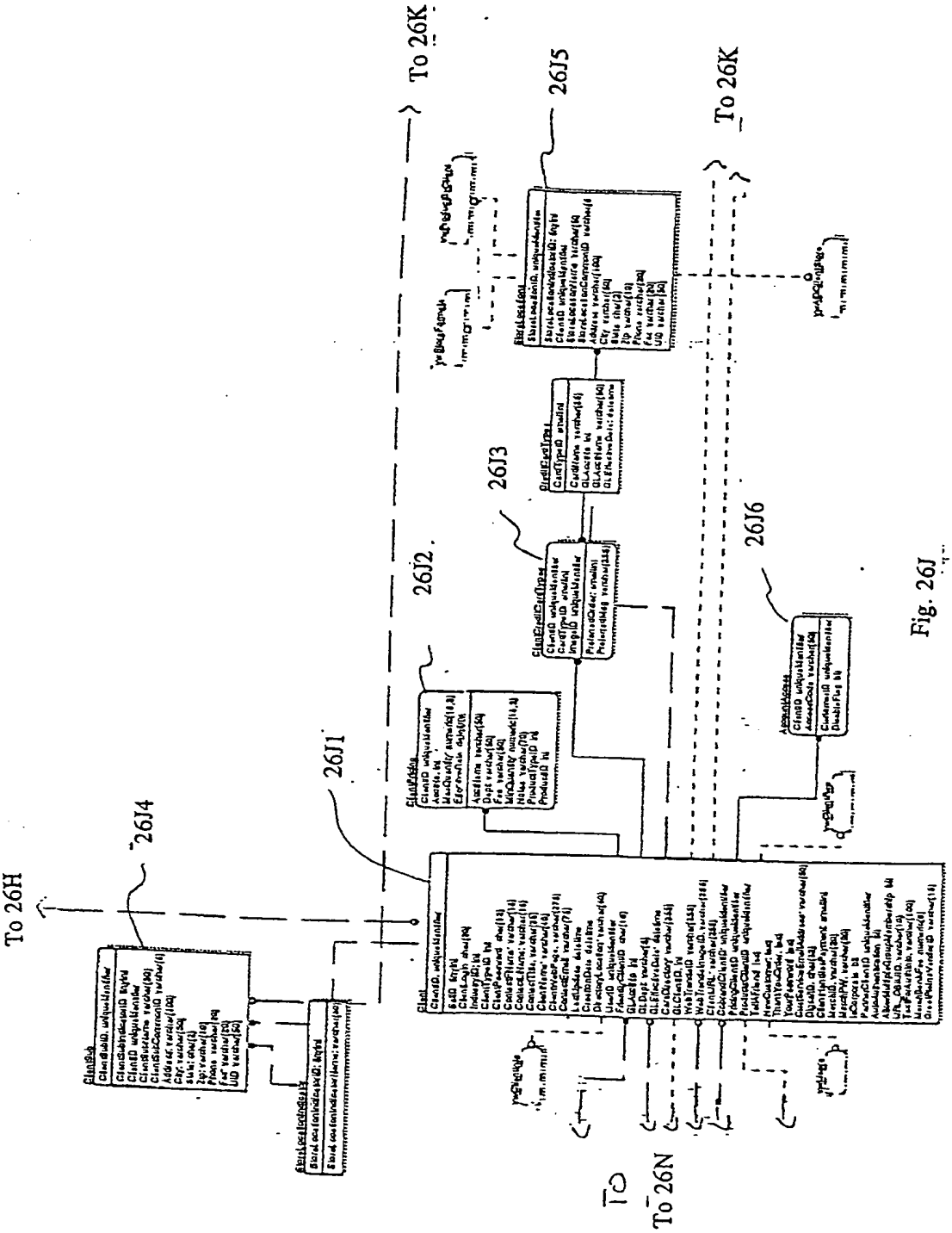


Fig. 26J

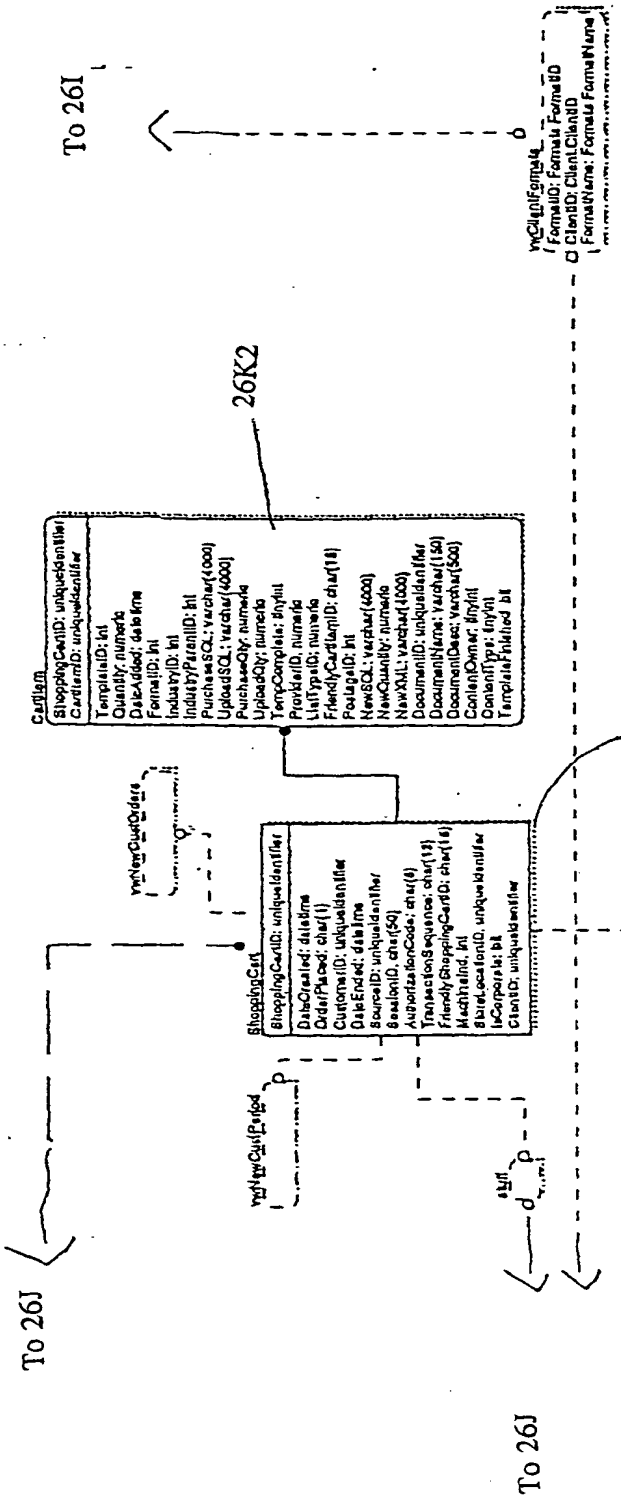


Fig. 26K

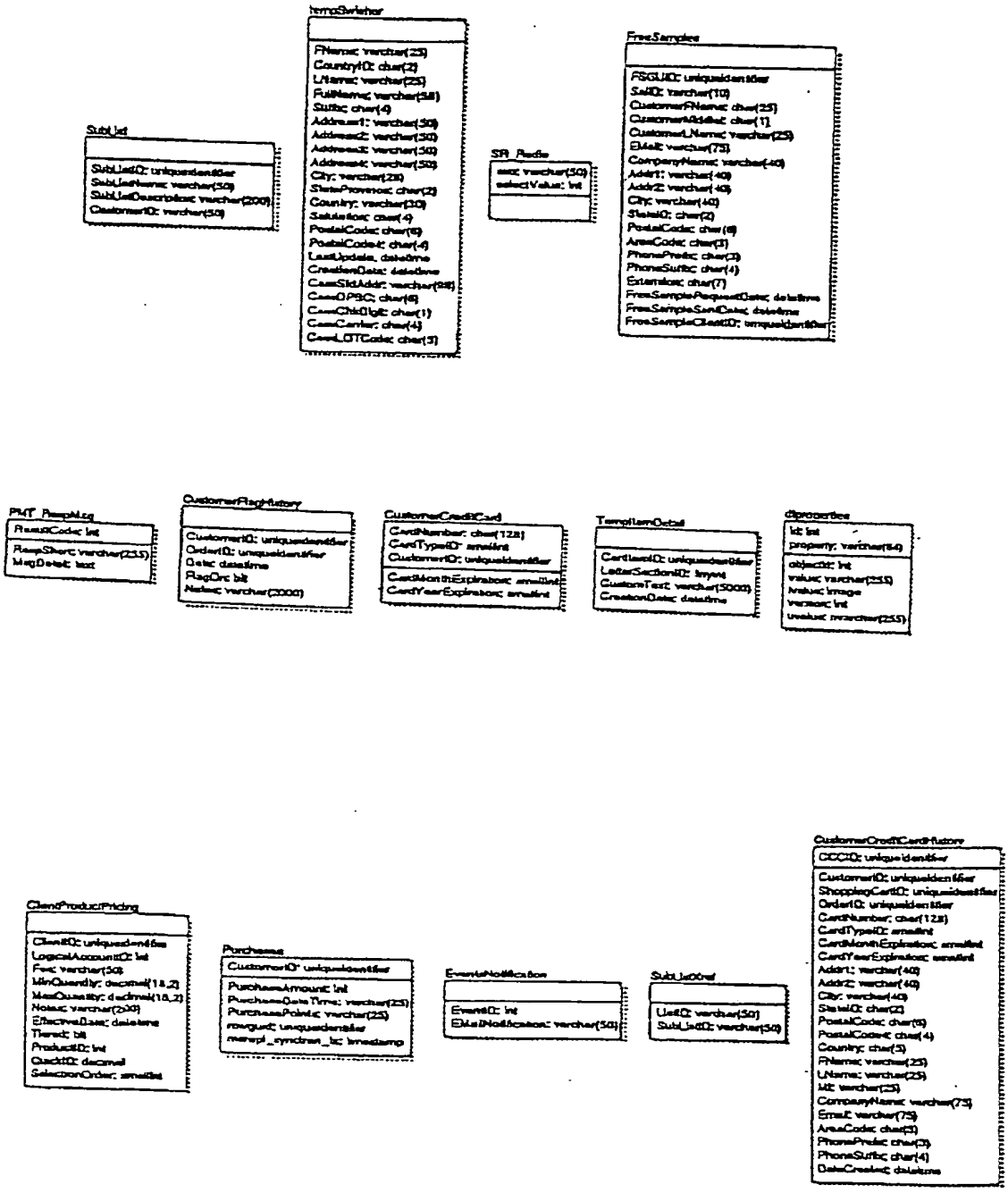

SubList
SubListID: uniqueidentifier
SubListName: varchar(50)
SubListDescription: varchar(200)
CustomerID: varchar(50)
tempSwisher
FName: varchar(25)
CountryID: char(2)
LName: varchar(25)
FullName: varchar(50)
Suffix: char(4)
Address1: varchar(30)
Address2: varchar(30)
Address3: varchar(30)
Address4: varchar(30)
City: varchar(28)
StateProvince: char(2)
Country: varchar(30)
SalutationInc: char(4)
PostalCode: char(6)
PostalCode4: char(4)
LastUpdate: datetime
CreationDate: datetime
CamSkidAddr: varchar(28)
CamZIP3C: char(6)
CamChildTgE: char(1)
CamCarrier: char(4)
CamLOTCode: char(3)
SR_Radio
text: varchar(50)
selectValue: int
FreeSamples
FSGUID: uniqueidentifier
SalID: varchar(10)
CustomerFName: char(25)
CustomerMidInit: char(1)
CustomerLName: varchar(25)
EMail: varchar(75)
CompanyName: varchar(40)
Addr1: varchar(40)
Addr2: varchar(40)
City: varchar(40)
StateID: char(2)
PostalCode: char(6)
AreaCode: char(3)
PhonePrefix: char(3)
PhoneSuffix: char(4)
Extension: char(7)
FreeSamplePassedDate: datetime
FreeSampleSentDate: datetime
FreeSampleClientID: uniqueidentifier
PMT_RespMsg
ResultCode: int
RespShort: varchar(255)
MsgDetail: text
CustomerFlagHistory
CustomerID: uniqueidentifier
OrderID: uniqueidentifier
Date: datetime
FlagOrc: bit
Notes: varchar(2000)
CustomerCreditCard
CardNumber: char(128)
CardTypeID: smallint
CustomerID: uniqueidentifier
CardMonthExpiration: smallint
CardYearExpiration: smallint
TemplitemDetail
CartItemID: uniqueidentifier
LetterSectionID: bigint
CustomText: varchar(5000)
CreationDate: datetime
dproperties
Id: int
property: varchar(64)
objectId: int
value: varchar(255)
lvalue: image
version: int
svalue: nvarchar(255)
ClientProductPricing
ClientID: uniqueidentifier
LogicalAccountID: int
Fee: varchar(50)
MinQuantity: decimal(18,2)
MaxQuantity: decimal(18,2)
Notes: varchar(200)
EffectiveDate: datetime
Tiered: bit
ProductID: int
QuickID: decimal
SelectionOrder: smallint
Purchases
CustomerID: uniqueidentifier
PurchaseAmount: int
PurchaseDateTime: varchar(25)
PurchasePoints: varchar(25)
rowguid: uniqueidentifier
merepl_syncbran_lc: timestamp
EventsNotification
EventID: int
EMailNotification: varchar(50)
SubUsDbd
UserID: varchar(50)
SubListID: varchar(50)
CustomerCreditCardHistory
CCCID: uniqueidentifier
CustomerID: uniqueidentifier
ShoppingCartID: uniqueidentifier
OrderID: uniqueidentifier
CardNumber: char(128)
CardTypeID: smallint
CardMonthExpiration: smallint
CardYearExpiration: smallint
Addr1: varchar(40)
Addr2: varchar(40)
City: varchar(40)
StateID: char(2)
PostalCode: char(6)
PostalCode4: char(4)
Country: char(3)
FName: varchar(25)
LName: varchar(25)
MI: varchar(25)
CompanyName: varchar(75)
Email: varchar(75)
AreaCode: char(3)
PhonePrefix: char(3)
PhoneSuffix: char(4)
DateCreated: datetime

Fig. 26L

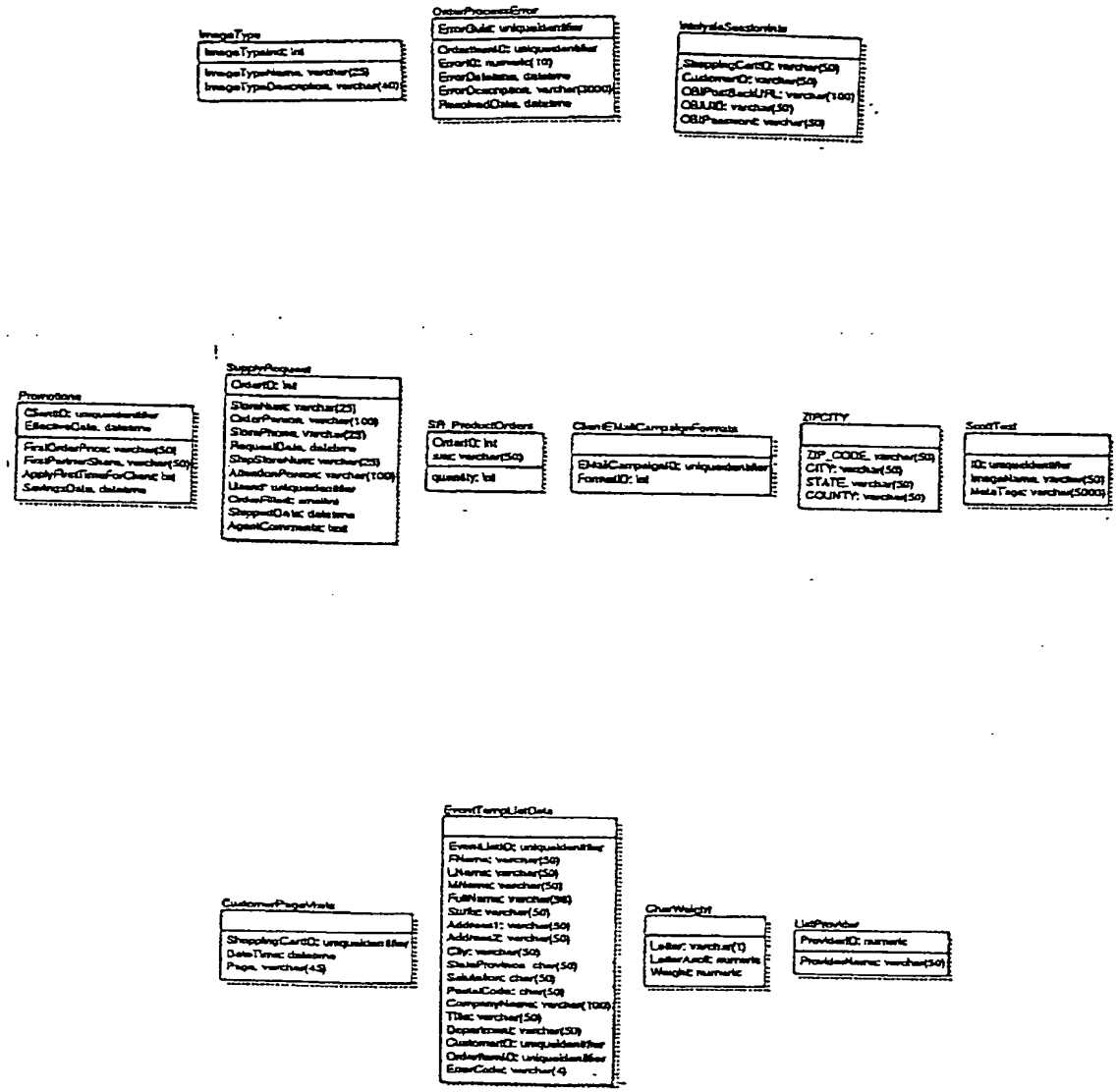

ImageType
OrderProcessError
InitialSessionInfo
Promotions
SupplyRequest
SP_ProductOrders
ClientEMailCampaignFormats
ZIPCITY
SaadTest
CustomerPageVisits
EventTempUserData
CheerWeight
ListProvider

Fig. 26M

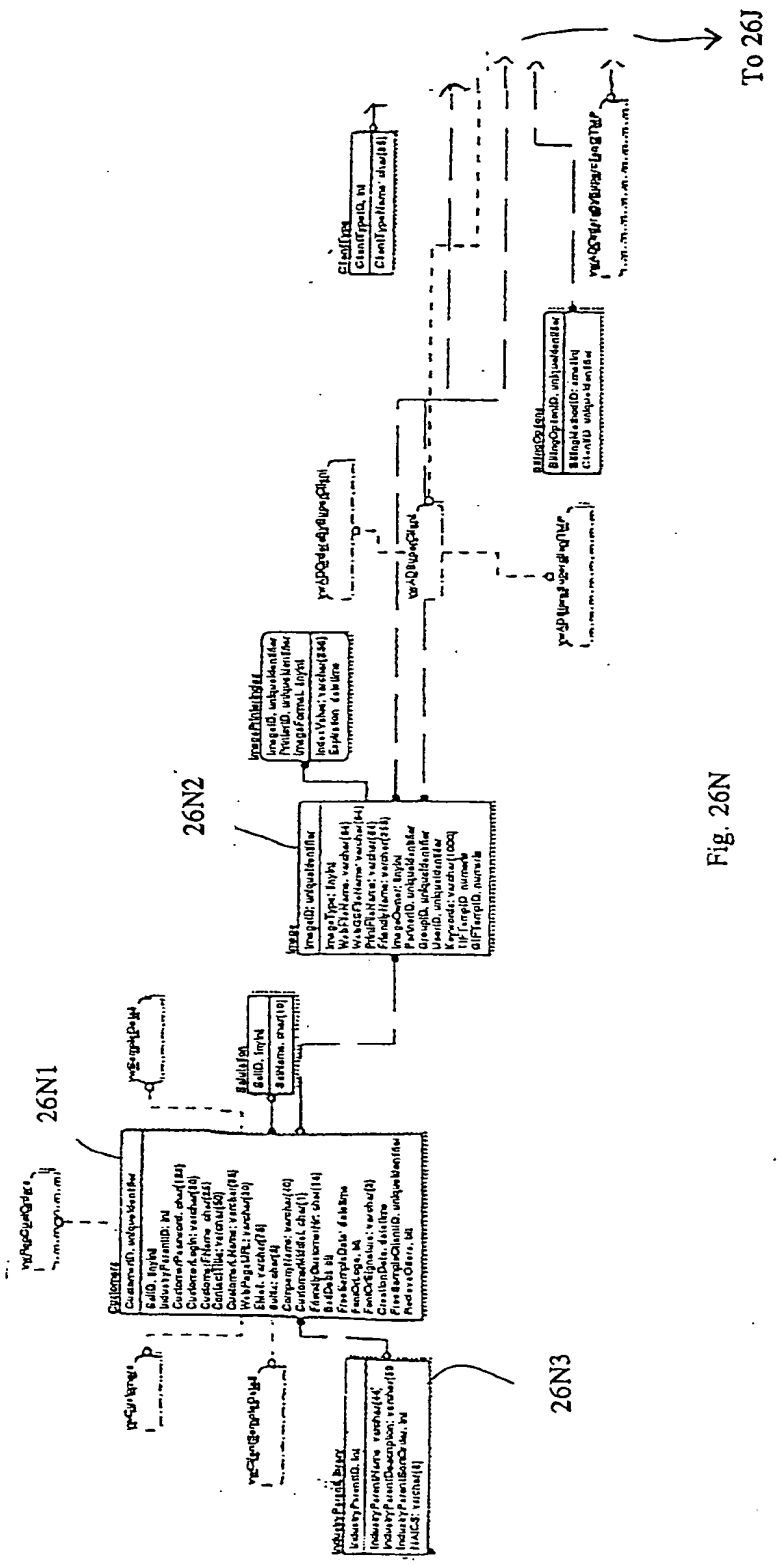
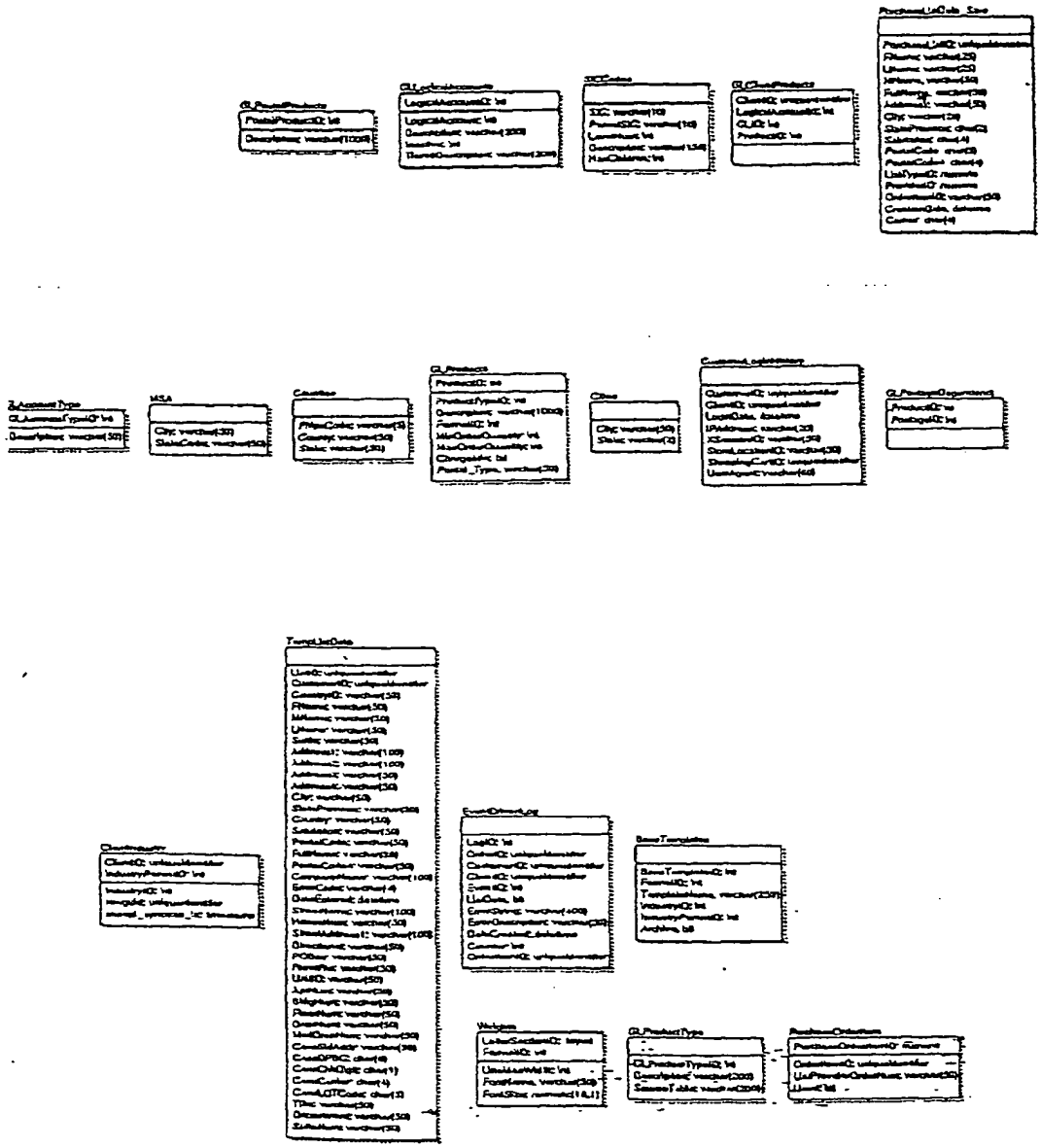


Fig. 26N

Fig. 26O



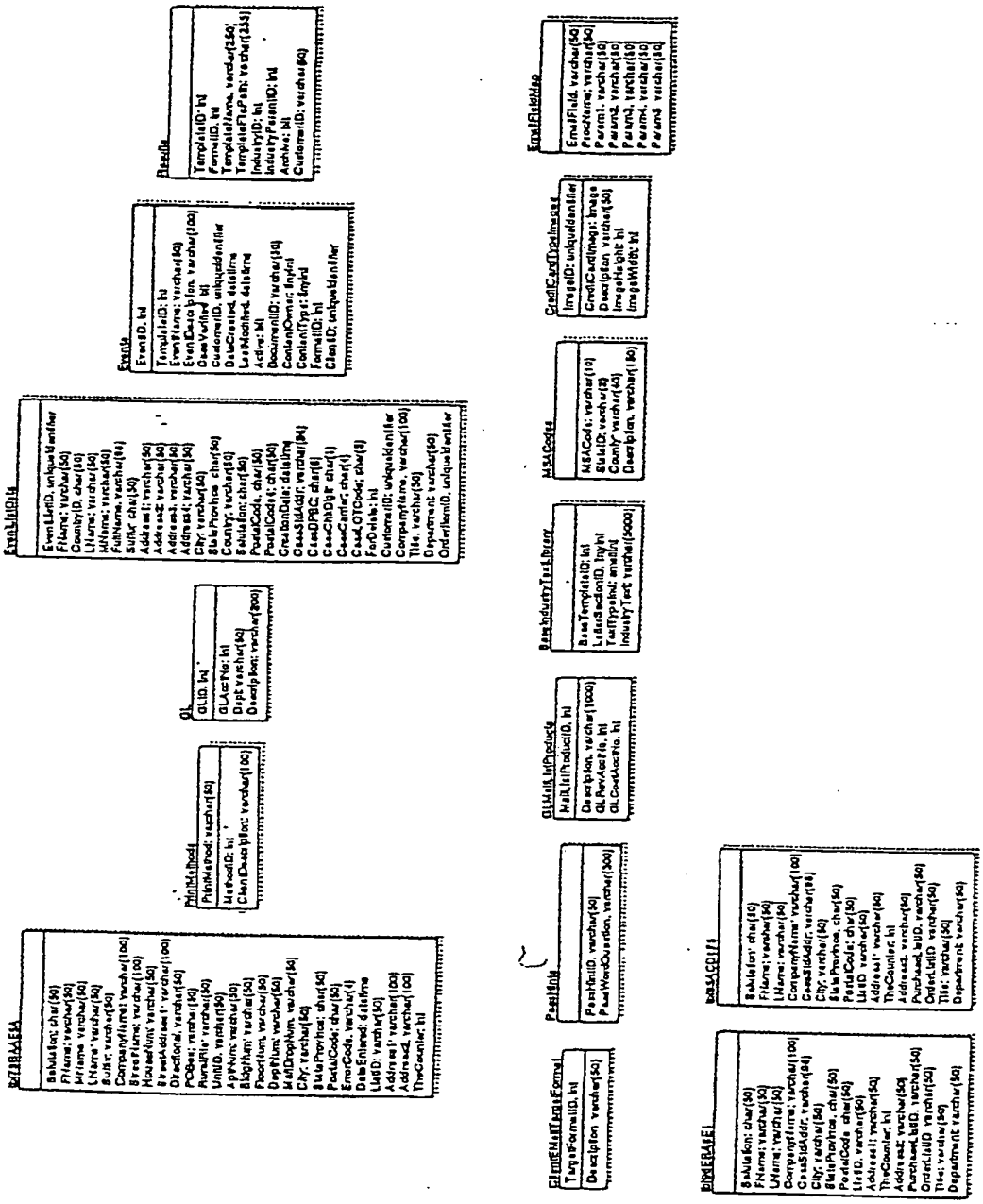


Fig. 26P

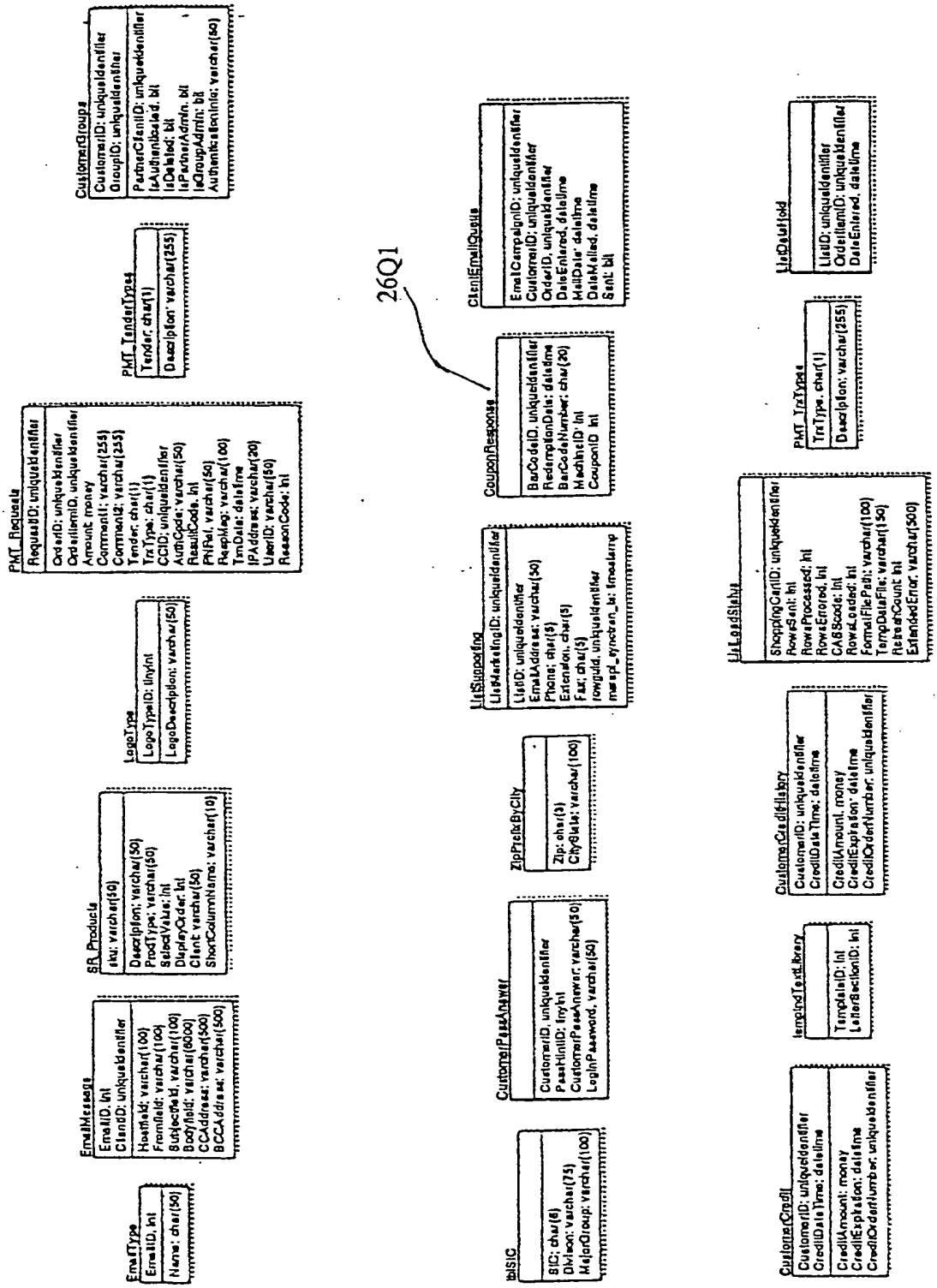

26Q1
CustomerGroups
CustomerID: uniqueIdentifier
GroupID: uniqueIdentifier
PartnerClientID: uniqueIdentifier
IsAuthenticated: bit
IsDeleted: bit
IsPartnerAdmin: bit
IsGroupAdmin: bit
AuthenticationInfo: varchar(50)
PMT_TenderTypes
Tender: char(1)
Description: varchar(255)
PMT_Request
RequestID: uniqueIdentifier
OrderID: uniqueIdentifier
OrderItemID: uniqueIdentifier
Amount: money
Comment1: varchar(255)
Comment2: varchar(255)
Tender: char(1)
TrxType: char(1)
CCID: uniqueIdentifier
AuthCode: varchar(50)
ResultCode: int
PNRef: varchar(50)
RespMsg: varchar(100)
TimDate: datetime
IPAddress: varchar(20)
UserID: varchar(50)
ReasonCode: int
LogoType
LogoTypeID: tinyint
LogoDescription: varchar(50)
SR_Products
sku: varchar(50)
Description: varchar(50)
ProdType: varchar(50)
SelectValue: int
DisplayOrder: int
Client varchar(50)
ShortColumnName: varchar(10)
EmailMessage
EmailID: int
ClientID: uniqueIdentifier
HostField: varchar(100)
FromField: varchar(100)
SubjectField: varchar(100)
BodyField: varchar(8000)
CCAddress: varchar(500)
BCCAddress: varchar(500)
EmailType
EmailID: int
Name: char(50)
tblSIC
SIC: char(6)
Division: varchar(75)
MajorGroup: varchar(100)
CustomerPassAnswer
CustomerID: uniqueIdentifier
PassWordID: tinyint
CustomerPassAnswer: varchar(50)
LoginPassword: varchar(50)
ZipPickByCity
Zip: char(5)
CityState: varchar(100)
UsSupporting
UsMarketingID: uniqueIdentifier
ListID: uniqueIdentifier
EmailAddress: varchar(50)
Phone: char(5)
Extension: char(5)
Fax: char(5)
rowguid: uniqueIdentifier
merge_synctran_bi: timestamp
CouponResponse
BarCodeID: uniqueIdentifier
RedemptionDate: datetime
BarCodeNumber: char(20)
MachineID: int
CouponID: int
ClientEmailQueue
EmailCampaignID: uniqueIdentifier
CustomerID: uniqueIdentifier
OrderID: uniqueIdentifier
DateEntered: datetime
MailDate: datetime
DateMailed: datetime
Sent: bit
UsOptOutId
ListID: uniqueIdentifier
OrderItemID: uniqueIdentifier
DateEntered: datetime
PMT_TrxTypes
TrxType: char(1)
Description: varchar(255)
UsLoadSlshp
ShoppingCartID: uniqueIdentifier
RowsSent: int
RowsProcessed: int
RowsErrored: int
CASBoods: int
RowsLoaded: int
EmailFilePath: varchar(100)
TempDataFile: varchar(150)
RetrieveCount: int
ExtendedError: varchar(500)
CustomerCreditHistory
CustomerID: uniqueIdentifier
CreditDateTime: datetime
CreditAmount: money
CreditExpiration: datetime
CreditOrderNumber: uniqueIdentifier
tempEmailTextLibrary
TemplateID: int
LetterSectionID: int
CustomerCredit
CustomerID: uniqueIdentifier
CreditDateTime: datetime
CreditAmount: money
CreditExpiration: datetime
CreditOrderNumber: uniqueIdentifier

Fig. 26Q

TARGETED ADVERTISING METHOD AND SYSTEM

CROSS REFERENCE TO RELATED APPLICATIONS

[0001] This application claims benefit of priority from Provisional Application Ser. No. 60/183,921, filed on Feb. 22, 2000, entitled "Direct Mail Now E-Commerce System," incorporated by reference in its entirety herein.

BACKGROUND OF THE INVENTION

[0002] A. Field of the Invention

[0003] The invention relates generally to the field of electronic services and, more particularly, to a method and system for closed-loop targeted advertising.

[0004] B. Description of the Related Art

[0005] Targeted advertising and promotional campaigns have been utilized in the field of advertising for many years. Typically a direct mail campaign is used to target a potential customer, often of a particular demographic group, such as age, wealth, location, and the like, to generate interest in a merchant's products. Typically, such a targeted advertising or promotional campaign involves many time consuming steps: (1) creating the advertising material (e.g., letter, survey, or the like); (2) producing multiple copies of the advertising material; (3) either placing an order to generate direct mail including the advertising material or self-generating the directed advertisement; (4) purchasing a customer list of multiple potential customers; (5) physically creating the mailing by folding, sealing, producing labels, applying postage, and delivering the mailing to a post office; and (6) having to hire an outside consultant to determine the effectiveness of the campaign or analyze the survey results.

[0006] Recently, various electronic commerce ("e-commerce") services have become available to the public via the Internet. In particular, services are available to process document correspondence for subscribers of a particular service. These are generally transaction based services where a client can submit an on-line order for the printing and mailing of a particular document. The documents may be authored by the customer from several document types and styles that are authored by the service. Once the order is placed, the document style, quantity and addressee list are forwarded in an electronic file format to the service provider who prints, posts, and mails the documents.

[0007] One problem with the aforementioned type of Internet service is that pre-authored and pre-formatted documents of a generic nature are offered to appeal to the broadest possible customer base. Alternatively, the client/merchant can customize the documents, but assumes full overhead costs in this instance.

[0008] The present invention is directed to overcoming or at least reducing the effects of one or more of the problems set forth above.

SUMMARY OF THE INVENTION

[0009] In view of the foregoing, according to a first embodiment of the present invention, a method of targeted advertising comprises generating a targeted advertising and/or promotional campaign material at a central facility corresponding to a client's selections, fulfilling the targeted advertising and/or promotional campaign material, and providing a response tracking analysis to the client. The targeted advertising and/or promotional campaign material includes a response tracking capability. In addition, the method can further include providing access for the client to contact a central facility on-line via a client web site, providing a set of options for the client to choose from in selecting a design of the targeted advertising and/or promotional campaign material, and providing a set of options for the client to choose from in selecting intended recipients of the targeted advertising and/or promotional campaign material.

[0010] The fulfilling step can comprise manufacturing the targeted advertising and/or promotional campaign material and distributing the targeted advertising and/or promotional campaign material to the intended recipients. The advertising and/or promotional campaign material can be at least one material selected from the group consisting of a document, a direct mail letter, a coupon, a flyer, and a postcard. Preferably, the advertising and/or promotional campaign material includes a coupon having a machine readable mark, symbol, or barcode that incorporates information relating to the client, the customer, and the advertising and/or promotional campaign. The machine readable mark, symbol, or barcode can be scanned and the information incorporated on the machine readable mark, symbol, or barcode can be electronically stored by a party receiving the coupon. In addition, the scanned coupon can be communicated back to the central facility and the client can be notified by the central facility as to response characteristics of the advertising and/or promotional campaign. In this method, the response tracking capability allows the client to determine whether a particular customer received and utilized the advertising and/or promotional campaign material.

[0011] According to another embodiment of the present invention, a method of generating an advertisement, comprises providing a client access to a central facility to create an advertising and/or promotional material, providing a database administered by the central facility that includes an electronically storable advertising and/or promotional template from which the client selects the format and content of the advertising and/or promotional material, and providing a customer list from which the client selects targeted customers of the advertising and/or promotional material. The method also includes processing data corresponding to the selected advertising and/or promotional material and data corresponding to the selected targeted customers, providing an order that identifies the processed advertising and/or promotional material data and targeted customer data, and communicating the order for fulfillment. In addition, response tracking data that relates the client, a particular customer from the targeted customers, and the order is processed and the advertising and/or promotional material is generated in communicable form for receipt by the targeted customers, where the communicable form includes a machine readable mark or code that includes the response tracking data.

[0012] Other advantages and novel features of the present invention will become apparent from the following detailed description of the invention when considered in conjunction with the accompanying drawings.

BRIEF DESCRIPTION OF THE DRAWINGS

[0013] The foregoing advantages and features of the invention will become apparent upon reference to the following detailed description and the accompanying drawings, of which:

[0014] **FIG. 1** shows a flow diagram of a targeted advertising/promotional method according to an embodiment of the present invention.

[0015] **FIG. 2** shows a flow diagram of a process for generating a targeted advertising and/or promotional material according to another embodiment of the present invention.

[0016] **FIG. 3** shows a flow diagram of a process for fulfilling a targeted advertising and/or promotional material order according to another embodiment of the present invention.

[0017] **FIG. 4** shows a flow diagram of a process for providing response tracking analysis of a targeted advertising and/or promotional campaign according to another embodiment of the present invention.

[0018] **FIG. 5** shows a flow chart of a closed-loop targeted advertising method for a direct mail campaign with response tracking capability according to a preferred embodiment of the present invention.

[0019] **FIG. 6** shows an example barcode and the portions of the barcode that can contain response tracking data.

[0020] FIGS. 7A-7C and 8-20 show a detailed example of the targeted advertising and/or promotional campaign generation process performed via a web browser application according to a preferred embodiment of the present invention.

[0021] **FIG. 21** shows a flow diagram and system in schematic form for an example fulfillment process according to another embodiment of the present invention.

[0022] **FIG. 22** shows an example template of a direct mail advertisement.

[0023] **FIG. 23** shows an example printer version XML document utilized to print the direct mail advertisement at the printer according to another embodiment of the present invention.

[0024] **FIG. 24** shows a schematic view of a system that can be utilized to create and manufacture a targeted advertisement and/or promotional material with response tracking capability according to yet another embodiment of the present invention.

[0025] **FIG. 25** shows an overview schematic diagram of a relational database utilized to provide list management and client configuration information at a central facility according to yet another embodiment of the present invention.

[0026] FIGS. 26A-26Q show various tables within an example relational database according to a preferred aspect of the present invention.

DETAILED DESCRIPTION OF SPECIFIC EMBODIMENTS

[0027] The present invention is directed to a method and system for targeted advertising. In particular, the present invention (including various embodiments thereof) provides a process for generating a targeted advertising and/or promotional material, a process for generating a targeted advertising and/or promotional material, and a process for providing response tracking analysis of a targeted advertising and/or promotional campaign. In particular, a closed-loop targeted advertising method for a direct mail campaign is provided that includes response tracking capability to allow a client (or user) to track and evaluate the effectiveness of a targeted advertising and/or promotional campaign within an enclosed environment. In this manner, a response analysis process can be continually updated and provided to the client that can directly tie a particular customer to a particular purchase (i.e., an actual response) in a fully integrated manner. With this capability, a client can better target and fully tailor subsequent advertising and promotional campaigns. The aforementioned methods, processes, and systems will now be described in greater detail.

[0028] **FIG. 1** shows a flow diagram of a targeted advertising and/or promotional method **100** according to an embodiment of the present invention. In step **110**, a client generates a targeted advertising and/or promotional campaign. For example, the client can be a national or locally based corporation, a merchant, or any member of the public. The advertising and/or promotional campaign is a communication that the client desires to distribute to a particular audience. Preferably, the client contacts a central facility on-line via its web site to generate the advertising and/or promotional campaign.

[0029] In step **130**, the advertising and/or promotional campaign is fulfilled. The fulfillment can be accomplished by creating or manufacturing an advertising and/or promotional material, such as a letter, coupon, flyer, postcard, or the like. For example, the promotional material can be a coupon which is physically generated by the central facility or a printing service in contact with the central facility. In addition, according to a preferred aspect of the present invention, the promotional material can include a response tracking capability. The response tracking capability allows the client to determine whether a particular customer received and utilized the promotional material. For example, the coupon can include a barcode or the like which incorporates information relating to the client, the customer, the product, the date of the advertisement, and the like, which can be scanned and stored by a merchant receiving the coupon.

[0030] In step **150**, a response tracking analysis is provided to the client. For example, the scanned coupon is communicated back to the central facility. The client is then alerted or notified by the facility as to the response characteristics of the advertising and/or promotional campaign. Each of these steps will be discussed in greater detail with reference to FIGS. 2-4.

[0031] **FIG. 2** shows a preferred method of implementing step **110**. In step **112**, a client is given access to a central facility which can be used to automatically generate the advertising and/or promotional campaign. For example, the central facility can offer on-line (dial-up) or Internet-based services to the client. Alternatively, a closed intranet can be established between the client and the central facility to enable access to the central facility by the client or an entity given permission by the client.

[0032] In step **114**, for example, the client can be given access to electronically storable advertising and/or promotional campaign template. Preferably, the client can choose from a library of advertising, promotional and/or correspondence templates and select a targeted advertising and/or promotional material that is best suited to the type of campaign being generated. The template can be altered or modified based on the client's desires. Alternatively, the client can create his or her own advertising material through the central facility.

[0033] Once the advertising and/or promotional campaign material is generated, in step **116**, the client can select the targeted audience to which the advertising and/or promotional campaign material is to be communicated. For example, if the client is an existing client, the central facility will provide access to a previously used customer list that is stored in a private client library at the central facility. Alternatively, the central facility can allow the client to purchase a new customer list to use separate from or in conjunction with the preexisting customer list for that client. In addition, the central facility can allow the client to choose a specific demographic group that is the targeted audience of the advertising and/or promotional campaign. The client can then select the intended target audience.

[0034] In step **118**, the central facility processes the advertising and/or promotional campaign material data and targeted customer data. In step **120**, an order that includes the processed advertising and/or promotional campaign material data and targeted customer data is generated for fulfillment.

[0035] **FIG. 3** shows a preferred embodiment of fulfillment step **130**. In step **132**, the order containing the processed advertising and/or promotional campaign material data and targeted customer data is received for fulfillment. The order can be fulfilled either at the central facility or it can be automatically communicated to a linked fulfillment center. In step **134**, the fulfillment center then physically generates the targeted advertising and/or promotional campaign material so that it can be communicated to its intended recipients (i.e., the targeted customers). For example, if the client is selecting a direct mail campaign, the advertising and/or promotional campaign material is printed in the form of a letter, flyer, coupon, postcard, or the like. Alternatively, if the client selects an e-mail campaign, the targeted e-mail is generated and prepared to send to the intended e-mail customer addresses.

[0036] In addition, during the physical generation of the targeted advertising and/or promotional campaign materials, in step **136**, response tracking data is generated and processed for inclusion on the targeted advertising and/or promotional campaign materials. As mentioned previously, the response tracking data provides information relating to several aspects of the campaign. For example, the tracking data can include the name of the order or offer, the intended customer's name, the name of the client, the order type, the date mailed, and/or other particular information. In a preferred embodiment, this information can be included on the targeted advertising and/or promotional campaign material in the form of a barcode or other type of machine readable mark, symbol or lettering. According to a preferred embodiment of the present invention, the central facility can generate this response tracking data automatically to provide the client with a response analysis of a particular advertising and/or promotional campaign. Thus, during fulfillment of the customer's order, the barcode or other machine readable mark is printed on the targeted advertising and/or promotional campaign material. To complete fulfillment, the generated materials are then communicated to customers via mail, courier service, voice, fax, digital communication or electronic mail in step **138**.

[0037] **FIG. 4** shows a preferred embodiment of response tracking analysis step **150**. In step **152**, the targeted advertising and/or promotional campaign material, which was received by an intended recipient customer, is communicated to a merchant from the customer. For example, if the target promotional material is a discount coupon, the customer redeems the coupon at a particular store when purchasing the discounted item. In step **154**, preferably, the merchant selling the discounted item then records and stores the promotional material. For example, if the promotional material is a coupon having a barcode or mark containing response tracking information, the merchant can scan or electronically read the barcode or mark. In one example, the tracking information is stored in a memory of a computer at the merchant site.

[0038] In step **156**, the response tracking information is then communicated to the central facility. For example, the merchant can access the central facility web site, whereupon the response tracking information is automatically synchronized to the central facility. Other conventional methods of communicating electronic information can also be utilized. Alternatively, if the merchant does not utilize a scanner or similar mechanism, once the coupon or other promotional material is redeemed, the merchant can then forward the coupon/promotional material to the central facility via mail or courier. The coupon can then be scanned at the central facility or other location.

[0039] In step **158**, the response tracking information is then stored at the central facility and the response data is communicated to the client. Storage of the response tracking information can be maintained at a private library for the client identified in the response tracking information. For example, when the client accesses the central facility's web site, the response tracking information for some or all of the client's advertising and/or promotional campaigns is available for viewing by the client, if so desired. Thus, according to a preferred embodiment of the present invention, a client can have an immediate and updated response analysis at any time.

[0040] A preferred embodiment of a closed-loop targeted direct mail campaign is described below with respect to **FIG. 5**. For purposes of this description, closed-loop means that the targeted advertisement (e.g., direct mail) and response tracking information are contained within the same client-central facility relationship and automatically linked so that relevant and updated customer and client information is accessible by the client to provide results analysis of the particular advertising and/or promotional campaign.

[0041] In step **202**, a client creates a direct mail piece on the web site of a central facility. In this step, the client has access to a library of direct mail advertising and promotional templates. The library can be a general library of templates or a private library devoted to the client. In addition, as discussed above, the client can select a previously used

customer list, purchase a new customer list, or modify a customer list with client-entered or client-purchased customer information.

[0042] By way of example, for purposes of this description, it is assumed that the client is an owner of a hair salon and the advertising material or piece is a set of three coupons: coupon **1** is for a 10% discount on a haircut; coupon **2** is for a 10% discount on a manicure; and coupon **3** is for $2.00 off a bottle of conditioner. In this example, the client modifies a previously used promotional piece stored in a private template library and existing customer list that is stored in a private list library. The modification includes purchasing a list that is based on the following demographic: individuals ages 25-39 residing within 5 miles of the hair salon.

[0043] In step **204**, the web site processes the client information and submits an order to a fulfillment center, in this example, a printer service associated with the central facility. In addition, because the client is an existing client, all payment information can be stored in a suitable client database at the central facility to further speed up the process of implementing the order.

[0044] In step **206**, the printer service takes the order and produces a direct mail material or piece. In this example, the direct mail letter includes the aforementioned 3 coupons. As discussed above, response tracking analysis is available by incorporating response tracking information directly within the direct mail material or piece. In this example, the response tracking information is provided in the form of a barcode or machine readable mark included on each of the coupons. As discussed further below, each barcode or mark can be different based on the client, the targeted advertisement order, the product, the customer, etc.

[0045] In step **208**, the postal service receives the direct mail from the printer and distributes it to customers. In step **210**, the customer receives the direct mail material or piece.

[0046] In step **212**, the customer uses the direct mail material or piece at the client's business or store, whereupon the client scans the coupon. In this example, the customer purchases a discounted haircut, but does not purchase the conditioner or a manicure.

[0047] In step **214**, the scanned information is stored in memory of the client's computer. The stored information is also hot sync'd to the client's database at the central facility. In this manner, the client's database at the central facility is continually updated with response information.

[0048] In step **216**, the client (e.g., hair salon owner) is notified by the central facility website that a detailed response analysis report is available. This response information can then be utilized to better tailor the next campaign. For example, the hair salon owner can view the results of the most recent campaign. Thus, the salon owner can have access to the following information: the overall response of the campaign, the name of the customer, the type of product purchased by the customer, and the date purchased. The salon owner can utilize this information in subsequent promotional campaigns. For example, in this scenario, the response analysis can inform the client of the particular customer that purchased the haircut (using coupon **1**), but did not utilize coupon 2 or coupon **3**. If a subsequent promotion involves only advertising conditioners, this particular customer may or may not be excluded, depending on the client's advertising strategy.

[0049] **FIG. 6** shows an example barcode **230** that can be included for response tracking analysis. In this example, the bar code includes different portions directed to different types of information: a first portion **232** that includes the name of the client order/offer; a second portion **234** that includes the name of the customer that the coupon was mailed to; a third portion **236** that includes the type of order; and a fourth portion **238** that includes the date of the coupon mailing. Other information can be included in the bar code or mark, such as the name of the client, etc., as would be apparent to one of ordinary skill in the art given the present description.

[0050] A detailed example of the targeted advertising and/or promotional campaign generation process is shown below with respect to FIGS. **7-20**. In this example, the central facility is administered by Click Tactics®, the client is a car dealer that owns Chris Williams Chevrolet, and the client is accessing Click Tactics® via its web site on the Internet. The physical implementation of this type of communication, and the underlying software used to implement the web site, will be described in later sections of the description.

[0051] In a preferred embodiment, the client desiring to create a direct mail campaign contacts the central facility through accessing its web site. The information from the web site is provided to the user via a web browser. After typing in a password, the client, if a pre-existing client, such as in this example, accesses a customized welcome page.

[0052] **FIG. 7A** shows a welcome page **300**, which is a customized web site designed at the central facility for the pre-existing customer. As shown on welcome page **300**, the page can provide detailed information for that particular client relating to previous advertising/promotional campaigns, new product information, and recommendations. Alternatively, a community web site can be established to greet a new client interested in placing an order.

[0053] If the client chooses the order center option **301**, an order center options page **302** is displayed, as shown in **FIG. 7B**. This page shows the general information relating to previous orders (e.g., order date, order status, shipped date, order name, order type, overall response) and allows the client the option of viewing detailed information by selecting option **303** for previous orders. In this example, the client selects a new postal order through new order prompt **304**.

[0054] **FIG. 7C** shows a new direct marketing campaign order page **305**. In a preferred embodiment, the client is presented with three main options: select campaign template, prepare customer list, and confirm order and submit. The confirm order option **310** can be selected after prompt **306** and **308** have been selected. To select a campaign template, the client can choose from a client facility library containing numerous possible templates. The client can also edit a selected template or use as is. The client can also proofread and print a sample copy before submitting an order.

[0055] As shown in prompt **308**, the client can prepare a customer list. The client can prepare the customer list before or after selecting a campaign template. Utilizing this cus-

tomer list preparation procedure, the client can upload a personal customer list (such as a list stored at a private client library at the client facility), purchase a customer list through the central facility, enter a new list on-line, and/or merge different lists.

[0056] After the client has selected a template and chosen a customer list, the client can place a direct mail campaign order using prompt **310**. This prompt can allow the client to review the order, confirm the pricing, and submit the order.

[0057] Assuming that the client has selected prompt **306**, the client can choose a campaign template from a library of templates, as shown in web page **312** in **FIG. 8**. In this preferred configuration, the client can choose a template based on the type of industry/product the client wishes to advertise. In this example, the car dealer client selects "sales-new" (prompt **313**) under "automotive." and Other types of indexing arrangements of templates are also possible, as will be apparent to those of ordinary skill in the art given the present description.

[0058] By clicking on prompt **313**, web page **314** is accessed, as shown in **FIG. 9**. In this example, the client chooses a template entitled "One Coupon Letter Available Titles" (prompt **315**) from a choice of several different templates. **FIGS. 10A and 10B** show illustrations of the selected template **316**, which includes a template coupon **317**. At this stage, the client can use the template "as is" or modify the template.

[0059] As shown on campaign template modification web page **318** in **FIG. 11**, the client has chosen to modify the selected template. In a preferred embodiment, the template is broken into several different sections to allow the client to walk through the different sections of the document through the web browser. Each section can be defined by one or more areas. In this example, the client has modified the discount from $2500 to $3500, in prompt **319**, which corresponds to a particular section of the template. Alternatively, the sections of the template can be keyed to the client's graphic interface (e.g., mouse) so that the client can point to the particular section to be modified, as would be apparent to one of ordinary skill in the art given the present description. Other sections (and areas) of the template, such as the header, body, and salutation can be modified as well. In addition, other physical formatting characteristics, such as stock color, highlight color, font, etc. (which are utilized during fulfillment by the printer service) can also be modified by the client.

[0060] Preferably, the client facility provides an underlying XML document that reflects all client-input modifications of the template when the client completes this stage of the process. After completing the desired modifications, the client can perform a spell check of the modified template by selecting prompt **320**.

[0061] **FIG. 12** shows an example of the modified template **322**, including the barcode **323**, which will be utilized for response tracking analysis.

[0062] At the central facility, for example, this client-entered information can be processed as follows. Preferably, an XML document based template can be formed based on the predefined document layout specification and client-entered information. The selected template will be pulled from either a main library of templates or the client's private library of templates stored at the central facility. The client's information will be merged into the XML document-based template and a new, customized XML document will be written. In a preferred embodiment, the new XML document can be formatted/translated correctly for the fulfillment services facility to use during printing. The translation may result in a file, or set of files, of a variety of formats/contents, depending on the fulfillment services facility preferences (e.g., Postscript, XML, etc.) and characteristics. This XML document file can also be named the same as the job number. Eventually, this XML file will be sent to the same queue as the customer address list, described below. Thus, according to the above process, the underlying XML model document is structured to provide an accurate version of the template, based on the printing characteristics of the printer that will be used to physically print the advertising piece. In this manner, the client will always view an accurate depiction of the final printed document, in terms of document format, font, color, and other characteristics.

[0063] After selecting the appropriate advertising/promotions piece, the client can return to web page **305**, as shown in **FIG. 13**, except that prompt **306** now indicates that the campaign template has been modified. At this point, the client selects prompt **308** to prepare the customer list.

[0064] **FIG. 14** shows customer list center page **325**, which presents the client with several list options **326** and information **327** relating to the saved customer list. In this example, the client can purchase a list, upload a customer list from a private client library, or enter a list via the web site. As shown in **FIG. 14**, the client selects to purchase a customer list. In one preferred aspect of the present invention, the purchased customer lists can be provided by a third customer list provider that is linked to the central facility. Alternatively, the central facility can maintain an updated set of internal customer lists.

[0065] **FIG. 15A** shows an example list purchase web page **330**. According to a preferred embodiment, the client can purchase a customer list based on key demographic characteristics, such as age, gender, length of residence, household income, occupancy type, marital status, dwelling type, and geographic area. For example, **FIG. 15A** shows several selection windows **330*a*-330*f*** that allow the client to select desired customer characteristics. In addition, **FIG. 15B** shows several example windows in which the client can choose a particular geographic region from which to select customers for the direct mail campaign.

[0066] In this example, the client has chosen to purchase a customer list containing 500 names. In **FIG. 16**, the client revisits web page **325**, which has been automatically updated to reflect the client's current selection, such as shown in window **328**. In this example, the client selects prompt **326*a***, which allows the client to upload a pre-existing customer list that is stored at the central facility in a private client customer list library.

[0067] **FIG. 17** shows an updated web page **325**, which has been updated to include a window **329**, which shows the characteristics of the client's previously saved customer list. The new total number of names selected is also automatically updated and displayed to the viewer in window **332**. Other client selection options are also shown on web page **325**, including the option to remove the purchased list, select particular names from the previously saved list, view and/or

edit the previously used list, and mark address exceptions. In this example, the client is finished with the customer list and selects "finished."

[0068] At the central facility, for example, this client entered information can be processed as follows. With respect to the address lists and coupon generation for results tracking analysis, an ASCII file can be generated with the job number at the top. Then the recipient's names and addresses, and other variable data, are written to the ASCII file in tab-delimited format. While each customer's information is written to the file, a coupon ID will be generated and written with each customer's address. This coupon ID can be sequential, beginning with the job number and ending in a number that will count up from a specified number. This identification scheme allows for internal tracking of coupons. Once the file is completely written, the file will be sent to a queue and wait there for an associated counterpart, in this example, the XML document, or other format, print version of the customized direct marketing piece.

[0069] **FIG. 18** shows that the client has returned to an updated order center web page **305**, which shows that the client has selected a template and prepared a customer list. In this example, the client selects prompt **310***a* to submit the direct mail order.

[0070] **FIG. 19** shows an order confirmation page **340**. This page allows the client to confirm the order, review the price, and provide further payment and client tracking information. For example, prompt **341** requests that the client signify that the order has been reviewed. Prompt **342** requests that the client enter a direct mail campaign name that can be used for response tracking analysis and billing purposes. Window **343** provides a summary of the oreder. Prompt **344** allows the client to select a particular payment method, such as by credit card. If the client already has an account with the central facility, that can be indicated in a further prompt (not shown) and the client can be billed using billing and accounting information stored in the database at the central facility.

[0071] **FIG. 20** shows a final confirmation page **345**, which provides a price total and a summary of the order for the client to print and save. In addition, page **345** also can provide information concerning the shipping and confirmation schedule of the order. In addition, prompt **346** asks the client if an additional order is desired. If so, selecting prompt **346** will return the client to the order center page where a new direct mail campaign can be designed and ordered. Accordingly, the client can tailor a particular direct mail piece for a desired potential customer base.

[0072] As discussed above, according to a preferred aspect of the present invention, the central facility runs against an underlying XML document that provides the definition of the targeted advertising piece. In this manner, it can be ensured that the client is viewing an accurate representation of what will be the final printed document. Examples of a direct mail piece and a Print Version XML document utilized to print the direct mail piece at the printer fulfillment center are shown in **FIGS. 22 and 23**, respectively.

[0073] **FIG. 22** shows a template **360**, which features an example advertisement for an automobile. The template can be apportioned into different portions in accordance with the underlying XML document. For example, the XML document can be broken into any number of Sections, each of which constitutes a 'step' in the document customization process. In each Section, there may be one or more defined Areas, which specify position and dimension of its content, either text or a graphic image. A Section can support multiple layout options or Choices (i.e. different sets of Areas), available to the user/client as an additional customization option. Additionally, the user/client can also have the choice of content within an Area, either graphic or text, as defined by the document template creator (some Areas may be defined as Text Only, others as Image Only or Either—in the latter case the user may choose which type of content). The document template creator can also provide pre-defined content within an Area, either defaulted text or graphics, and can in fact provide multiple Choices of content from which the user may choose. Finally, the document template creator may have elected to "Lock" the content of an Area, preventing the user from modifying the original contents. All of the above-mentioned options/choices and specifications are reflected in the underlying XML document.

[0074] For example, Area 'height' can be specified as variable, rather than a fixed height, to support variable length 'paragraphs'. As a result, Areas may not only be positioned absolutely, with a defined top & left coordinate, but relative to other Areas, to allow for 'floating' Areas positioned relative to their variable height counterparts.

[0075] For Text content, the underlying template specifies all font characteristics, and the application controls the total amount of allowable content based on those font characteristics and the dimensions of the enclosing Area.

[0076] For Variable data, any Text content can contain references to variable data (recipient-specific information) that will be present within the final order's tab-delimited ASCII text file.

[0077] For Image or Graphic content, the application can proportionally scale down the image, as necessary, to fit the enclosing Area, thereby allowing for flexibility in image selection. Preferably, to preserve image quality, images will not be scaled up.

[0078] The XML document can also contain document-wide specifications and user choices, such as the choice of print stock and highlight color selection (for Highlight color output).

[0079] Concerning the Print Version, a translation from the customization-oriented XML document referenced above, to a printer-specific XML (or other format) document can be performed. This translation is essentially a paring down of the document to the essential print details. All Choices are eliminated, leaving only the selected Choice, all positioning is converted to absolute positioning for text and images, all text is positioned absolutely, line by line, with all font characteristics specified. For all Graphic Images contained within the document, the high resolution print versions are loaded, scaled, re-sampled and reformatted depending on output, and the file details, width and height are placed in the document. References to Variable data contained within the tab-delimited ASCII text file remain inline within the context of the document, for merging at the print fulfillment facility. An example of a Print Version XML document is shown in **FIG. 23**. In this example, "Area ID=1" corresponds to area **362** shown in **FIG. 22**. The Print

Version XML document shown in **FIG. 23** can be understood in accordance with the following example definitions and attributes:

[0080] 1.0 Document: Defines the entire printed document and contains one to many Page Elements; Content="eltOnly"

[0081] Attributes

[0082] PrintMethod: Required: True; Indicates the type of printing.

[0083] 1—Black no color

[0084] 2—Black and a Spot (Highlight) color.

[0085] 3—DigitalColor (4 Color).

[0086] Values: "Black", "HighlightColor", "DigitalColor"

[0087] syntax: [PrintMethod=string]

[0088] HighlightColor: Required: True If PrintMethod= "HighlightColor", Indicates the color used as the spot/highlight color. Must be one of the previously agreed upon spot colors available at the printer.

[0089] Value: Color expressed as a string formatted as "RRGGBB" with each color represented by a hexadecimal number (web format)

[0090] syntax: [HighlightColor=string]

[0091] Children: Page–minOccurs="0" maxOccurs="*" refer to section 2.0

[0092] Parents: [none]

[0093] 2.0 Page: Defines a single page of the printed document; Content="eltOnly"

[0094] Attributes

[0095] ID: Required: True; A unique number (within the CTIDocument) used to reference a specific Page.

[0096] Size: Required: True; Specifies the stock type.

[0097] Values: "Letter", "Legal" and "UserDefined"

[0098] syntax: [Size=string]

[0099] Width: Required: True; Specifies the width of the Page.

[0100] Values: Values: inches with the following mask; "#.#in."

[0101] syntax: [Width=string]

[0102] Height: Required: True; Specifies the height of the Page.

[0103] Values: inches with the following mask; "#.#in."

[0104] syntax: [Height=string]

[0105] StockID: Required: True; Using a pre-defined identifier, StockID specifies the stock for printing, either regular or custom stock.

[0106] syntax: [StockID=string]

[0107] Orientation: Required: True when Size < > "UserDefined"); Specifies the paper orientation of all supported Size definitions. The only exception is when the size= "UserDefined"

[0108] Values: "Portrait", "Landscape"

[0109] syntax: [Orientation=string]

[0110] PageNumber: Identifies the physical page number, used for sequencing of multi-page documents. Please note each page number corresponds to both sides of the page.

[0111] Values: "1 . . . +"

[0112] syntax: [PageNumber=int]

[0113] Children: Must contain either a <Front> or a <Back> element. See section 3.0.

[0114] Order="seq"

[0115] Front: minOccurs="0" maxOccurs="1" refer to section 3.0

[0116] Back: minOccurs="0" maxOccurs="1" refer to section 4.0

[0117] Parents: CTIDocument: refer to section 3.0

[0118] 3.0 Side: Contains all the areas for a side of the page.

[0119] Content="eltOnly"

[0120] Attributes

[0121] Face: Required: True; Specifies the side of the page.

[0122] Values: "Front", "Back"

[0123] PreviewFile: Required: True; Specifies the preview file for the specified side of the page. Supported preview files are jpg, pdf and html.

[0124] Values: filename.extension

[0125] syntax: [PreviewFile=string]

[0126] Children: Area: minOccurs="1" maxOccurs="*" refer to section 5.0

[0127] Parents: Page: refer to section 2.0

[0128] 4.0 {placeholder}

[0129] 5.0 Area: Defines a rectangle on the page that contains a Text or Image or Table.

[0130] Content="eltOnly"

[0131] Attributes

[0132] ID: Required: True; A unique number (within the Side element) used to reference a specific Area.

[0133] Top: Required: True if Absolute="TRUE", Specifies the y coordinate in inches from the top edge of the stock to the top of the defined area.

[0134] Values: inches with the following mask; "#.#in."

[0135] syntax: [Top=string]

[0136] Left: Required: True; Specifies the distance x coordinate form the left edge of the paper.

[0137] Values: inches with the following mask; "#.#in."

[0138] syntax: [Left=string]

[0139] Width: Required: True; Specifies the width of the area.

[0140] Values: inches with the following mask; "#.#in."

[0141] syntax: [Width=string]

[0142] Zorder: Required: True; Specifies the zorder of the areas that overlap.

[0143] Values: 0+

[0144] syntax: [ZOrder=int]

[0145] Orientation: Required: True; Specifies the orientation of the area content.

[0146] Values: 0 to 360

[0147] syntax: [Orientation=int]

[0148] Children: Contains only one of the following:

[0149] Text: minOccurs="0" maxOccurs="1" refer to section 6.0

[0150] Image: minOccurs="0" maxOccurs="1" refer to section 9.0

[0151] Table: minOccurs="0" maxOccurs="1" refer to section 10.0

[0152] Parents: Side: refer to section 3.0

[0153] 6.0 Text: Contains 1 to many Paragraphs.

[0154] Content="eltOnly"

[0155] Attributes

[0156] [None]

[0157] Children: Paragraph: minOccurs="1" maxOccurs="*" refer to section 7.0

[0158] Parents: Area: refer to section 5.0

[0159] Table: refer to section 10.0

[0160] 7.0 Paragraph: Defines the paragraph definitions for 1 to many TextFragments that are within a carriage return.

[0161] Content="eltOnly"

[0162] Attributes

[0163] Alignment: Required: True; Specifies the horizontal alignment of the paragraph.

[0164] Values: "LEFT", "CENTER", "RIGHT"

[0165] syntax: [Alignment=string]

[0166] Bulleted: Required: True; Specifies if the paragraph is to contain a bullet.

[0167] Values: "TRUE", "FALSE"

[0168] syntax: [Bulleted=boolean]

[0169] BulletIndent: Required: True if Bulleted="true", Specifies the x coordinate of the bullet from the left edge of the Area.

[0170] Values: inches with the following mask; "#.#in."

[0171] syntax: [BulletIndex=string]

[0172] BulletTextIndent: Required: True if Bulleted="true", Specifies the x coordinate for the start of the text from the left edge of the Area.

[0173] Values: inches with the following mask; "#.#in."

[0174] syntax: [BulletTextIndex=string]

[0175] Children: Line: minOccurs="1" maxOccurs="*" refer to section 8.0

[0176] Parents: Text: refer to section 6.0

[0177] 8.0 Line: Defines the soft carriage return-defined lines in a paragraph.

[0178] Content="eltOnly"

[0179] Attributes

[0180] Spacing: Required: True; Measured in Points (72 points/inch). Specifies the total vertical distance occupied by a line of text, from the top of the highest Font Bounding Box for the line to the next line's top of its' highest FontBBox.

[0181] Children: TextFragment: minOccurs="1" maxOccurs="*" refer to section 9.0

[0182] Parents: Paragraph: refer to section 6.0

[0183] 9.0 TextFragment: Contains a series of words that are related by the attributes of the TextFragment attribute and does not contain a carriage return (see Paragraph section 6.0). All text of the element is of CData type. If the TextFragment is defined as variable the element will contain the sample text.

[0184] Content="textOnly"

[0185] Attributes

[0186] Type: Required: True; Specifies the type of text fragment.

[0187] Values: "Static", "Variable"

[0188] syntax: [Alignment=string]

[0189] VarName: Required: True If Type="Variable", Specifies the variable data tag name that will be contained in the variable data file.

[0190] Values: Predefined values setup with the printer.

[0191] syntax: [VarName =string]

[0192] FontName: Required: True; Specifies the name of the font used.

[0193] Values: Predefined values setup with the printer.

[0194] syntax: [Bulleted=string]

[0195] Size: Required: True; Specifies the font size of the specified FontName attribute.

[0196] Values: point sizes as integer.

[0197] syntax: [Size=integer]

[0198] UnderLine: Required: True; Specifies if the font is underlined.

[0199] Values: "TRUE", "FALSE"

[0200] syntax: [UnderLine=boolean]

[0201] ForeColor: Required: True; Specifies the fore color of the font. Note: the following scenarios for the CTIDocument element:

[0202] Scenario 1—If the HighlightColor attribute of the CTIDocument is different from the ForeColor attribute of the TextFragment element and the PrintMethod attribute is

equal to HighLightColor then default ForeColor to black (000000). Furthermore, always default the Forecolor to black (000000) when the PrintMethod is equal to "Black".

[0203] Value: Color expressed as a string formatted as "RRGGBB" with each color represented by a hexadecimal number (web format)

[0204] syntax: [ForeColor=string]

[0205] BackColor: Required: False; Specifies the background color of the font. This is only valid if PrintMethod is equal to DigitalColor.

[0206] Value: Color expressed as a string formatted as "RRGGBB" with each color represented by a hexadecimal number (web format)

[0207] syntax: [ForeColor=string]

[0208] Children: [None]

[0209] Parents: Line: refer to section 7.0

[0210] 10.0 Image: If the image is included with the print job then the Image element text contains the filename of the image. If the image is referenced to a stored image at the printer then the image element text is null. The image name contains the filename.extension.

[0211] Content="textOnly"

[0212] Attributes

[0213] PrinterIndex: Required: True If image is referenced and stored at the printer; Specifies the printer index identifier predefined with the printer.

[0214] syntax: [PrinterIndex=string]

[0215] Width: Required: True; Specifies the width of the image.

[0216] Values: inches with the following mask; "#.#in."

[0217] syntax: [Width=string]

[0218] Height; Required: True; Specifies the height of the image.

[0219] Values: inches with the following mask; "#.#in."

[0220] syntax: [Height=string]

[0221] ColorOverride: Required: False; Specifies the color scale of the image. This is only valid when PrintMethod < > "Black".

[0222] Value: Color expressed as a string formatted as "RRGGBB" with each color represented by a hexadecimal number (web format)

[0223] syntax: [ForeColor=string]

[0224] Children: [None]

[0225] Parents: Area: refer to section 5.0

[0226] In addition to the above definitions and attributes, the term "content" specifies type of element content allowed, where content="textOnly" is defined such that the element can contain only text and attributes, not elements; content="eltOnly" is defined such that the element can contain only other elements and attributes, but not free text; content="empty" is defined such that the element cannot contain text or elements; and content="mixed" is defined such that the element can contain a mix of named elements and text. This is the default value. When elements and text are mixed together, elements must not be between portions of the text. It is also preferable to set all elements together followed by the data for the element.

[0227] The aforementioned process can be utilized in conjunction with the fulfillment process in the following manner. After the client has completed ordering, the central facility will prepare an order package for fulfillment that includes the client entered information in a data form that can be processed by the fulfillment service facility.

[0228] In conjunction with the on-line generation of a desired targeted advertising and/or promotional campaign, according to a preferred aspect of the present invention, the central facility can be linked with a service, such as a printing service, to fulfill a client's order, in a client-server configuration. An example **400** of the communications process between the central facility **402**, which processes the client's order, and the services facility **404**, which fulfills the order, is shown in **FIG. 21**.

[0229] An order is placed at start step **406**. The central facility processes the order and writes out an order file at step **408**. The order file **410** can include numerous information about the particular order, including a configuration file, an address file, a body file, an image file, an automatic signature file (for the particular client), and the like.

[0230] In one example, the order file layout can include the following:

[0231] (1) Address File: The file is to be named [ordernumber].dbf. The file format is an ASCII file quoted and tab delimited. The file can contain the following columns: CouponID; Salutation; First Name; Last Name; Address 1; Address 2; City; State; and Zip and other variable data, on a recipient-by-recipient basis. The columns are referenced within the Document definition file for recipient-by-recipient merging into the content of the document at the print facility.

[0232] (2) Document definition file: The file is to be named [ordernumber].extension. The file extension can vary, depending on the particular print fulfillment center's preference. For example, it may be a print-version XML document, which would be named [ordernumber].xml, or a postscript file, named [ordernumber].ps, or other formats. The file content is ASCII text, which contains the body of the advertising piece, if needed.

[0233] (3) Images: Any images referenced in the Document definition file will be included in the order, named [imageidentifier]_n.tif, where n is the instance of a particular image in the order.

[0234] Other order file layouts can also be utilized as would be apparent to one of ordinary skill in the art given the present description.

[0235] In step **412**, the order file is placed in the orders subdirectory **416**, which can be part of an orders database **414** at the central facility **402**. For example, this order subdirectory can be part of a secure FTP site.

[0236] At the services facility **404**, the order fulfillment process is started at step **430**. As shown in step **432**, timed intervals can be used to check for files in the orders

subdirectory at the central facility. For example, after a client places an order, the system shown in **FIG. 21** can wait for 90 minutes (or other appropriate time), to allow the client to change/modify the order.

[0237] In step **436** it is determined whether any files exist in the orders subdirectory. If the determination is yes, then in step **440**, a first file is downloaded from the central facility into the download file **442** at the services facility **404**. The first file can contain one or more particular orders. Also, the downloading can be implemented using a secure socket layer (SSL) FTP client-server configuration. In addition, the services facility can unzip/unpackage the first file and use the data to start printing. For example, the services facility can take the direct mail piece in postscript form and use the variable data to print out as many direct mail pieces as there are addresses in the associated customer list (e.g., ASCII) file.

[0238] In step **444**, the first file is moved from the orders subdirectory **416** to the history subdirectory **418** at the central facility **402**.

[0239] If the determination in step **436** is no, then it is determined in step **438** whether there is an ASN (an advanced shipping notification that contains the status and shipping information for placed orders) file to be uploaded. If the determination from step **438** is no, then the process returns to step **432**. If the determination in step **438** is yes, at step **448**, the ASN file is uploaded to the subdirectory **420** at the central facility. Also, the uploaded ASN file is placed in a local ASN subdirectory **446** at the services facility **404**.

[0240] For example, the FTP subdirectory structure (order, history, and ASN) can have the following characteristics and structure:

[0241] <ROOT>

[0242] /orders: order files for download will be located;

[0243] /asn: ASN files uploaded to this location; and

[0244] /history: after an order file is downloaded (the file should be moved out of the orders subdirectory into this location.

[0245] In another example, the ASN file can have the following layout and characteristics. The ASN file can be named [mmddyyhhmm].asn. The file format can be file tab delimited. The file can be uploaded at the same time the printer checks for the orders. The file can be a log containing all order status information for orders processed to that point. The file can also contain the following columns: ORDERID; STATUSID; VALID VALUES (05-order printed; 06-order shipped; 11-cancelled before print; and 12-cancelled after print); DATETIME STAMP; QTY (where the quantity field can be provided on status 05); and CANCELLATION NUMBER (which can be provided on status 11 or 12). Other ASN file layouts and FTP structures can also be utilized as would be apparent to one of ordinary skill in the art given the present description.

[0246] In step **426**, an NT service at the central facility monitors the subdirectory **420**. When a file is placed in subdirectory **420**, the service extracts the date time data from the file for the order and updates the direct mail database **424**. In addition, in step **422**, the NT service monitors the history subdirectory **418**. When a file is placed in this subdirectory, the direct mail database **424** is updated with a date time stamp that the order was picked up by the services facility. At step **450**, the upload is complete. Once the upload is complete, the fulfillment center can physically generate the order (e.g., by printing the desired direct mail letters/coupons/postcards). In addition, the central facility is notified that the order has been picked up and the direct mail database is updated accordingly.

[0247] For example, the aforementioned NT service can monitor the job holding queue and when a job number/time stamp is sent to the queue, the service facility will pull each record from the database containing the name and the addresses of customers from the client's list.

[0248] To implement this fulfillment process, for example, the services facility can convert the downloaded files and extract variable data from the ASCII flat files to the service facility's database (not shown). The finished printed material (e.g. direct mail piece) can then be sent to the intended customers. Other processes can be utilized to fulfill orders, as would be apparent to one of ordinary skill in the art given the present description.

[0249] As mentioned previously, according to a preferred aspect of the present invention, during the generation of the target advertising and/or promotional material, a response tracking analysis capability is provided with the target advertising and/or promotional material in order to allow the client to receive continually updated response analysis of the advertising campaign. In a preferred aspect, the target advertising and/or promotional material is provided with a barcode or machine readable mark that contains client/customer/product information utilized to evaluate the effectiveness of the advertising and/or promotional campaign. For example, the barcode can be detected at a client site using a conventional barcode scanning device. In addition, the data retrieved from the scanned barcode can be stored in a personal computer or memory of the barcode scanner. This response tracking information is then synchronized with the client's database at the central facility when the client's computer or scanning device is linked to the central facility. In this manner, the appropriate tables within the client facility are updated with the response tracking information. Preferably, this response tracking information is provided with one or more of the following ties: (1) ties to the order; (2) ties to the coupon; (3) ties to the client that the retailer came through (e.g., if a parent corporation is a client that gave permission to a franchisee/retailer to provide the particular coupon); (4) ties to the recipient of the coupon; (5) ties to the client/retailer that ordered the coupon. In addition, it is preferred to structure an index number to reduce the actual ID number that is provided for each coupon, so that a client or retailer with access to the central facility database can read the index number. For example, the index can be a **18*n*** character code with two characters that identify the printer/manufacturer. This scheme also allows the central facility to utilize more than one particular printer for a particular order, if necessary.

[0250] According to another embodiment of the present invention, a system is provided which can implement the aforementioned processes or variations of those processes. With reference to **FIG. 24**, an on-line service, such as the internet, is described. Alternatively, other dial-up, private intranet, or other known types of electronic communications

can be utilized. In addition, where the preferred aspect of this embodiment relates to a single internet URL (uniform resource locator) on the world wide web (WWW), it is understood that several URLs can be utilized, including at least one mirror site to provide backup to the parent site. The mirror site can replicate the parent site and mirror all parent site transactions in order to improve the availability of the parent site during periods of high volume, or other conditions, such as power outages, etc.

[0251] FIG. 24 shows a system 500 according to an embodiment of the invention. The system 500 includes an electronic communications system, such as an on-line or Internet-based service. In a preferred embodiment, the aforementioned advertising and/or promotional services are offered to users through public Internet 510 or private intranet 512. For example, a personal user client 502 can communicate to central facility 530 via dial-up (public internet) 514, 517 or direct dial line 513. Alternatively, the user can be a merchant 504 that communicates to central facility 530 via dial-up (public internet) 516, 517 or direct dial line 515. In another aspect of system 500, the user can be a corporate client 506 that communicates to central facility 530 via the internet (lines not shown), private intranet 519, 518, or direct dial line 520. In addition, the user can be a retailer 508 associated with the corporate client 506 that communicates to central facility 530 via internet (not shown), private intranet 521, 518, direct dial line 522, or through the associated corporate client. ISPs and CSPs (commercial service providers) are also contemplated in the above communication schemes.

[0252] The central facility web site communicates to the various communications lines via communication ports, such as com ports 531, 537, and 533. The central facility also includes a primary domain controller, or web server 540 to interface through bus 550 with the browser software of clients accessing the URL and to deliver the individual browser commanded web sites. In addition, the central facility 530 can include a main database 560 to provide, among other things, list management and response tracking capabilities. Database 560 can include one or more libraries (signified by library database 562), a client database 564, and a customer database 566. The main database 560 can store a wide variety of accounting, client, customer, list, response analysis, template, and other information. The main database 560 will be described in greater detail below.

[0253] In addition, client facility 530 can include an application server (shown as SQL server 542) to handle application operations exchanged through the bus 550 between the browser software and the main database 560. A message query server 544 can also be included.

[0254] For example, with respect to the hardware, the central facility can employ the following types of commercially available servers: Compaq Proliant 5500R web servers configured with processors, RAM, mirrored drives, and a Microsoft Site Server; Compaq Proliant 1600R FTP servers and a Certificate server (with associated hardware); a Compaq Proliant 1600R SQL server (with associated hardware); and clustered Compaq Proliant 7000 database servers (configured with appropriate hardware). Other physical implementations will become apparent to those of ordinary skill in the art given the present description.

[0255] The system 500 can also include a com port 534 that provides communication from the central facility 530 to a customer list provider service 570 via line 524. In addition, a com port 535 can be included to provide communications either directly or through a public and/or private communications network 511 to a fulfillment center, such as fulfillment centers 581, 582, and 583. As mentioned above, the fulfillment center can be used to print or manufacture the desired targeted advertising and/or promotional campaign materials. Further, central facility 530 can be linked to a marketing analysis center 590 which can further evaluate and perform additional marketing analysis using the updated response tracking data stored at the central facility.

[0256] Preferably, a web site operating system software can be Microsoft® Windows NT®-based. The web server operations can be controlled by the Primary Domain Controller, using a Microsoft Internet Information Server (ISS) software, such as version 4.0, or the like, which is integrated with the Windows NT Directory Services, to provide an integrated platform that makes the Internet an integral part of the operating system. In addition, as mentioned previously, various XML documents can be utilized to optimize the ability of the system in providing clients with accurate and reliable representations of the targeted advertising and/or promotional materials being generated within.

[0257] Preferably, the main database 560 is a relational database that is SQL structured to provide simultaneous access to thousands of users, if needed. The database management system (DBMS) software, i.e., the collection of commands and programs that provide the entering, storing, organizing and data retrieval capabilities of the database, can be a Microsoft SQL Server software, e.g., version 7.0, or the like, which is installed on the applications server 542. SQL provides the base language (syntax and idioms) used to query relational databases in a standardized, cross/platform/product manner through an open database connectivity (ODBC) access standard.

[0258] For example, Microsoft transaction Server software can be installed in server 542 to function as an ODBC, thereby providing the ability to access data from any application, regardless of the DBMS utilized. In this example, a middle layer database driver can be inserted between the application and the DBMS, which translates applications data queries into commands understood by the DBMS.

[0259] In addition, the central facility 530 can employ a layered security approach, such as with a secure sockets layer (SSL) for communications technique. This technique can be supplemented with a 128 bit DES or greater encryption of sensitive data while in transit between clients/retailers and while residing in the database. Additional technologies such as firewalls, authentication and authorization can be used to prevent breaches in unauthorized access to the central facility 530. In addition, the application services can be detached and protected from the web site itself by placement in remote, protected servers.

[0260] The languages utilized can be Active Server Pages (ASP), Visual Basic (VB), Visual C++, JavaScript, VB Script, HTML, XML, Perl, and other conventional languages.

[0261] The targeted advertising and/or promotional service materials, documents, and the like, can be stored in the main database 560.

[0262] An example database 600, corresponding to database 560, is shown in FIG. 25. A preferred implementation

of database **600** is shown in detail in FIGS. **26**A-**26**Q. Preferably, database **600** is a relational database comprising a plurality of tables that include client, template, customer list, user profile, and other types of related information. Using this structure, the database provides accessible information relating to e-commerce transactions, execution, and history. In addition, the database includes security and administration capabilities. In this manner, the database provides configuration information for corporate clients. Further, in accordance with a preferred aspect of the present invention, the database provides list management and response analysis. The database also provides general accounting and pricing information.

[0263] As shown in a high level, database **600** can include related tables that provide accounting information **610**, response analysis information **620**, coupon barcode ID information **630**, client configuration information **640**, orders information **650**, order items information **660**, customers/profiles information **670**, customer list information **680**, and purchase list information **690**. The tables store the aforementioned information in the form of records, where the tables can be related by keys. For example, when a client submits a new order, order items are identified, customers can be selected from old or new customer lists, and customer information from private libraries can be keyed. This particular information is then used to generate new data, namely a new coupon ID for a particular direct mail piece, that is stored in the database and that can be used for response tracking analysis. This barcode ID can link the client to the customer to the order to the product, and so on.

[0264] In greater detail, a preferred relational database is shown in FIGS. **26**A-**26**Q. In these figures, Tables are identified by title, with primary and foreign keys (if shown) listed above the internal horizontal lines of the tables. The types of records are apparent from their labels. The information contained in the example database can be utilized in a manner consistent with the previous description herein. Other structures for the database will become apparent to those of ordinary skill in the art given the present description.

[0265] The following is a brief description of some of the features of a preferred relational database structure according to this embodiment of the present invention. For simplicity, a limited number of the tables shown in **FIGS. 26A through 26Q** will be described. The description is representative and is not meant to limit the scope of the preferred database shown in the figures. Given the present description, the information provided by and other features of the remaining tables will be apparent to one of skill in the art.

[0266] For example, client configuration information is shown in **FIG. 26J**. This information includes Client table **26J1**, Client Pricing table **26J2**, Credit Card Types table **26J3**, Client-Sub table **26J4**, Store Locations table **26J5**, and Account Access table **26J6**. In this structure, tables are linked via foreign keys, such as ClientID, StoreLocationID, and ClientSubID, which are unique identifiers. Other tables and records can also be provided as shown in **FIG. 26J**.

[0267] In this example, user profile information and image libraries can be included in the tables shown in **FIG. 26N**. This information can include a Customers table **26N1**, which provides a CustomerID (unique identifier) key and an Image table **26N2**, which references user images stored in the database. Other information, such as an Industry Parent Library, can also be included.

[0268] **FIGS. 26H, 26I**, and **26K** show tables providing order, order item, and fulfillment information. For example, an Orders table **26H1**, with its associated records, is shown in **FIG. 26H**. In addition, an Order Status table **26H2** and an Order Status History table **26H3** can also be included in the database. **FIG. 26I** shows an Order Item table **26I1** that provides an OrderItenID key. As shown, the Order Item table utilizes record information from various other tables within the database to store information concerning a particular order. In **FIG. 26K**, a Shopping Cart table **26K1** and a Cart Item table **26K2** are shown, to provide and store further information concerning a particular client order.

[0269] In addition, as shown in **FIGS. 26B and 26Q**, customer list and coupon identification information can be provided. For example, **FIG. 26B** shows List Data table **26B1** and Order List table **26B2**. In **FIG. 26Q**, a Coupon Response table **26Q1** is shown. This table includes the BarCodeID unique identifier record, which can be used for response analysis.

[0270] Further, general accounting information is maintained in the database, as shown in **FIGS. 26O and 26P**. For example, the tables headings beginning with the prefix "GL" can be used for accounting purposes, as would be apparent to one of ordinary skill in the art given the present description.

[0271] In addition, template information can be stored as shown in Templates table **26F1**, shown in **FIG. 26F**. Further, an Order List Information table **26F2** is also shown in **FIG. 26F**.

[0272] Thus, a targeted advertising method and system have been described according to the embodiments of the present invention. The targeted advertising method and system provide on-line or Internet-based services which offer clients the ability to compose, print, address, and deliver customized advertising and/or promotional materials to selected addressees. In addition, the centralized design of the above system and method can provide fast and accurate service in a timely and cost-effective manner. Further, the system and method provides an enclosed or closed-loop system that allows a client to automatically receive information concerning the effectiveness of the selected advertising and/or promotional campaign when desired. The method and system provide a response analysis process that can directly tie a particular customer to a particular purchase (i.e., an actual response) in a fully integrated manner. With this capability, a client can better target and fully tailor subsequent advertising and promotional campaigns. In addition, the targeted advertising method and system of the present invention provides both corporate and localized marketing capabilities.

[0273] While the above provides a full and complete disclosure of the preferred embodiments of the present invention, various modifications, alternate constructions, and equivalents may be employed without departing from the scope of the invention. Therefore, the above description and illustration should not be construed as limiting the scope of the invention, which is defined by the appended claims.

What is claimed is:

1. A method of targeted advertising, comprising:

generating a targeted advertising and/or promotional campaign material at a central facility corresponding to a client's selections;

fulfilling the targeted advertising and/or promotional campaign material, wherein the targeted advertising and/or promotional campaign material includes a response tracking capability; and

providing a response tracking analysis to the client.

2. The method according to claim 1, further comprising:

providing access for the client to contact a central facility on-line via a client web site;

providing a set of options for the client to choose from in selecting a design of the targeted advertising and/or promotional campaign material; and

providing a set of options for the client to choose from in selecting intended recipients of the targeted advertising and/or promotional campaign material.

3. The method according to claim 1, wherein the fulfilling step comprises:

manufacturing the targeted advertising and/or promotional campaign material, wherein the advertising and/or promotional campaign material is at least one material selected from the group consisting of a document, a direct mail letter, a coupon, a flyer, and a postcard: and

distributing the targeted advertising and/or promotional campaign material to intended recipients.

4. The method according to claim 3, wherein the at least one material includes a coupon having a machine readable mark, symbol, or barcode that incorporates information relating to the client, the customer, and the advertising and/or promotional campaign.

5. The method according to claim 4, wherein the machine readable mark, symbol, or barcode is scanned and the information incorporated on the machine readable mark, symbol, or barcode is electronically stored by a party receiving the coupon.

6. The method according to claim 5, wherein the scanned coupon is communicated back to the central facility and the client is notified by the central facility as to response characteristics of the advertising and/or promotional campaign.

7. The method according to claim 1, wherein response tracking capability allows the client to determine whether a particular customer received and utilized the advertising and/or promotional campaign material.

8. A method of generating an advertisement, comprising:

providing a client access to a central facility to create an advertising and/or promotional material;

providing a database administered by the central facility that includes an electronically storable advertising and/or promotional template from which the client selects the format and content of the advertising and/or promotional material;

providing a customer list from which the client selects targeted customers of the advertising and/or promotional material;

processing data corresponding to the selected advertising and/or promotional material and data corresponding to the selected targeted customers;

providing an order that identifies the processed advertising and/or promotional material data and targeted customer data;

communicating the order for fulfillment;

processing response tracking data that relates the client, a particular customer from the targeted customers, and the order; and

generating the advertising and/or promotional material in communicable form for receipt by the targeted customers, wherein the communicable form includes a machine readable mark or code that includes the response tracking data.

9. The method according to claim 8, wherein the advertising and/or promotional material is a direct mail document printed in the form of a letter, flyer, coupon, or postcard.

10. The method according to claim 8, wherein the advertising and/or promotional material is an electronic mail (e-mail) message, and wherein the targeted e-mail message is generated and prepared to send to e-mail addresses of the targeted customers.

11. The method according to claim 8, wherein the response tracking data includes data related to the order name, the particular customer's name, the client's name, and the order type.

12. The method according to claim 8, wherein the machine readable mark or code is printed on the communicable form of the advertising and/or promotional material.

13. The method according to claim 8, further comprising:

communicating the advertising and/or promotional material to customers via mail, courier service, voice, fax, digital communication or electronic mail.

14. The method according to claim 8, wherein client access to the central facility is provided by an on-line (dial-up) or an internet-based communications channel.

15. The method according to claim 8, wherein client access to the central facility is provided by a closed intranet communications channel.

16. The method according to claim 8, wherein the client selected template is stored in a private database library related to the client.

17. The method according to claim 8, further comprising:

providing an underlying XML document that defines the targeted advertising and/or promotional material that is an accurate representation of the communicable form of the advertising and/or promotional material.

18. The method according to claim 8, further comprising:

providing a previously used customer list that is stored in a private client library at the central facility.

19. The method according to claim 8, further comprising:

providing the client with a new customer list based on client selections related to demographic characteristics of the targeted customers.

20. A method of fulfilling an order for a targeted advertisement, comprising:

generating an order for a targeted advertisement, the order containing data related to the form and content of the targeted advertisement and data related to intended recipients of the directed advertisement;

placing an order file corresponding to the order in an orders subdirectory at a first site;

periodically checking for order files in the orders subdirectory at the first site;

determining whether any files exist in the orders subdirectory;

if the determination is yes, downloading a first file from the first site into a download file at a second site and moving the first file from the orders subdirectory to a history subdirectory at the first site;

if the determination is no, then further determining whether there is a notification file that includes status and shipping information for placed orders;

if the further determination is no, then returning to said checking for order files step;

if the further determination is yes, uploading the notification file to a notification file subdirectory at the first site and placing the uploaded notification file in a local subdirectory at the second site;

monitoring the notification subdirectory such that when a file is placed in the notification subdirectory, date time data is extracted from the order file and a corresponding database is updated; and

further monitoring the history subdirectory such that when a file is placed the history subdirectory, the corresponding database is updated with a date time stamp that the order was picked up by the second site.

21. The method according to claim 20, further comprising:

unzipping/unpackaging the first file to extract data for printing at the second site; and

printing the targeted advertisement based on the extracted data.

22. The method according to claim 21, wherein the data related to the form and content of the targeted advertisement is in XML form and the data related to intended recipients of the directed advertisement is in a flat ASCII file.

23. The method according to claim 20, further comprising:

notifying the first site that the order has been picked up; and

updating the database.

24. A system for generating a client selected targeted advertisement, comprising:

a communication port for receiving a communication line accessed by the client;

a primary domain controller coupled to a central facility to interface the client to the central facility through software;

a relational database in communication with the primary domain controller via a bus to provide list management, client configuration and response tracking capabilities to the central facility, wherein the relational database includes at least one client data library, at least one template library, a response tracking library, and at least one customer list library;

an application server to handle application operations exchanged through the bus between the software and the relational database, wherein when the accesses the central facility, the client is provided with a set of options for the client to choose from in selecting a design of the targeted advertising and/or promotional campaign material, and wherein the client is provided with a set of options for the client to choose from in selecting intended recipients of the targeted advertising and/or promotional campaign material.

25. The system according to claim 24, further comprising a second communication port to provide a communication channel from the central facility to a customer list provider service.

26. The system according to claim 24, wherein the central facility generates an order that identifies processed advertising and/or promotional material data and targeted customer data corresponding to the client's selections.

27. The system according to claim 26, further comprising:

a third communication port to provide communications of the order to a fulfillment center, wherein the fulfillment center prints the selected targeted advertising and/or promotional campaign material and distributes the targeted advertising and/or promotional campaign material to intended recipients, and wherein the printed targeted advertising and/or promotional campaign material includes a machine readable mark or code incorporating information relating to the order, the client, and the customer recipient.

28. The system according to claim 26, wherein the machine readable mark or code is a bar code that comprises a first portion that includes the name of the client order/offer; a second portion that includes the name of the customer that the targeted advertising and/or promotional campaign material was mailed to; a third portion that includes the type of order; and a fourth portion that includes the mailing date of the targeted advertising and/or promotional campaign material.

29. The system according to claim 27, wherein an order file corresponding to the order is placed in an orders subdirectory at the central facility, wherein the fulfillment center checks for order files in the orders subdirectory at the central facility in timed intervals; wherein if an order file is present in the orders subdirectory, a first file is downloaded from the central facility to the fulfillment center and wherein the central facility moves the first file from the orders subdirectory to a history subdirectory at the central facility.

30. The system according to claim 29, wherein the fulfillment center determines whether there is a notification file that includes status and shipping information for placed orders if no order file is present in the orders subdirectory during the checking, wherein if a notification file is present, the fulfillment center uploads the notification file to a notification file subdirectory at the central facility and places the uploaded notification file in a local subdirectory at the fulfillment center.

31. The system according to claim 29, wherein the central facility monitors the notification subdirectory such that when a file is placed in the notification subdirectory, date time data is extracted from the order file and the relational database is updated, and wherein the central facility monitors the history subdirectory such that when a file is placed the history subdirectory, the corresponding database is updated with a date time stamp that the order was picked up by the fulfillment center.

* * * * *